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SOCIAL SCIENCES, BUSINESS AND ADMINISTRATION

THE FUTURE OF WORK AND KPY NOVAPOLIS

How changes in working life affect the tenants of a business hub

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Abstract

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Abstract

Changes in working life form a major external factor affecting the requirements of the workplace. This thesis explores how the working life and business premises field will change in the near future. The aim is to provide information that can help the commissioner organisation, a business premises provider KPY Novapolis, to prepare for the changes in working life that affect their tenant companies, and provide better services and spaces for their clients.

Based on the theoretical background, a quantitative study was conducted to analyse how the employees of the tenant companies at KPY Novapolis as well as external, potential clients view their working life will change in the next three years and whether they would they use certain services if they were offered in their workplace. The data was gathered with an online survey including questions regarding central themes of the future of work as well as workplace qualities and services. The final sample consisted only from the employees of Novapolis' tenants as there were only two external respondents.

In conclusion, the results indicated that remote work continues in the next three years and many adopt a hybrid model of working. The workplace and home remain the most popular work locations, whereas a few utilize multi-locality more broadly. Moreover, most respondents recognized a need for continuous learning and believed that work and leisure can be kept separated in the future. The most popular categories of workplace qualities and services were restaurant and coffee services as well as services supporting physical wellbeing.

Keywords

Working life, business premises, future, KPY Novapolis

CONTENTS

1 INTRODUCTION

1.1 Background

The reality in which we live in has seen massive changes during the almost two years of global pandemic. The effects on industries, businesses and people around the world have shown how quickly the present can transform. Changes in working life form a major external factor affecting the need for office space. As the operational environments of organizations transform, it has further effects on the demands of the workplace (Harris, 2015). By viewing the future, also commercial real estate companies can make decisions concerning the future changes in the working life (Toivonen 2011). When the COVID-19 virus was pronounced to be a global pandemic, the effects on all aspects of life have been widely discussed. These effects have at least partially changed the estimated future of working life as well as the development directions of business premises (Hiltunen 2020; Luoma-aho 2021).

This thesis focuses on estimating how working life and business premises field will change in the future. The topic of this thesis connects the changes in the working life and the development directions of business premises to the commissioner organisation. KPY Novapolis is a Finnish business premises provider with three locations in Kuopio area, two at Savilahti and one at Toivala. They offer varied spaces and services to their versatile tenant base and are focused on being the trendsetter of the modern workday experience. (KPY Novapolis s.a.a) By connecting the future of working life with the future of business premises and service supply, Novapolis can prepare for the future changes that affect their tenant companies and the demands regarding their workplace qualities.

Personally, the main aim for this thesis is to develop my professional knowledge regarding the future of working life and business premises field as well as carrying out a quantitative research. As I am an employee at Novapolis, connecting the current topic of changing working life to the business premises feels logical. The current employment at Novapolis supports the process of conducting this thesis with pre-existing background information about Novapolis and the business premises field. This also enables developing the topic towards issues that are important for Novapolis, such as the wellbeing of their tenants and easier everyday life. The future of working life and the development directions of business premises provide a background to developing Novapolis' service supply to support the new ways of working.

1.2 Research questions and objectives

The objectives of this thesis are to view how working life is changing in the next few years and how Novapolis could improve their service supply. These objectives are approached by building the theoretical background around the topics of changes in working life and changes in the business premises as well as benchmarking foreign office space providers. Based on the theoretical background a quantitative survey is conducted where the two main research questions are answered. These research questions are **Q1: How the end-user's** (employees of the tenant companies of KPY Novapolis and potential future tenants) **view their working life will change in the next three years** and **Q2: What services would the end-users utilize if they were offered in the workplace**? With these questions, the study aims to provide information on how the changing working life is present in the lives of the current and potential end-users of Novapolis as well as what services are wanted in the workplace. The objective is to provide information that can help Novapolis to prepare for the changes in working life that affect their tenant companies, and provide better services and spaces for their clients.

The next two chapters define the theoretical background regarding the changes in working life and in business premises field. Along with developmental directions of corporate real estate and business premises the third chapter views seven benchmarked companies in the commercial real estate market. The research chapter includes description on how the survey was conducted and the results. The fifth chapter connects the results to the theoretical background, establishes conclusions and presents suggestions. Validity and reliability of the research are discussed also in the fifth chapter.

1.3 Key concepts

Commercial real estate

"Land and buildings used for business" (Cambridge Dictionary 2021), meaning the buildings are used for commercial purposes, including office buildings.

Corporate real estate

"The real property that a company owns or holds for the purposes of housing its operations" (Gartner 2021).

Regular business centre

Office building with longer lease-agreements, private spaces and few shared spaces, and low service level (Weijs-Perrée et al. 2015).

Serviced office

Office building with shorter lease-agreements, high amount of shared spaces, high service level and is typically targeted towards freelancers, remote workers and SME's (Weijs-Perrée et al. 2015).

Co-working offices

"Have the objective to stimulate knowledge transfer and to create a working community", many different shared spaces, and short contracts (Weijs-Perrée et al. 2015).

Business park

"An area where company offices and light industrial premises are built." (MOT Oxford Dictionary of English 2021).

Business hub

Here: Business premises that include different private and shared spaces, high service level, co-working facilities and aspiration to generate community atmosphere and network from its clients.

Flexible space

Includes serviced office space, co-working facilities, as well as spaces that include both features (BCO 2019). Might have short lease-agreements or 'pay-as-you-go' -principles.

Multi-locality

"The quality or fact of being present or operating in many places simultaneously" (MOT Oxford Dictionary of English 2021), here: being able to work for example from home, the office, co-working spaces and café's or other spaces.

Basic concepts in anticipating the future

Instead of trying to predict the future, it is far more useful to try to anticipate how actions might affect the future and recognize different possibilities. It is necessary to understand that predictions and foresight are only educated guesses and might not become reality. However, well-prepared future scenarios can help with decision making and forming the wanted future. (Hiltunen 2012, 54.) Basic concepts that help to construct the possibilities of future are megatrends, trends, weak signals and wild cards (Figure 1). In this thesis the notion of future is divided into two concepts to better describe the time span of the changes. The 'near future' means the next three years and 'further or subsequent future' refers to the situations more than three years away from the time this thesis is written. Some authors have used zero to two years as the time period for short-term changes (for example Heinonen 2020), yet since the COVID-19 pandemic is still sustaining the atmosphere of uncertainty, three years provides hopefully enough time for forming 'the new normal'.

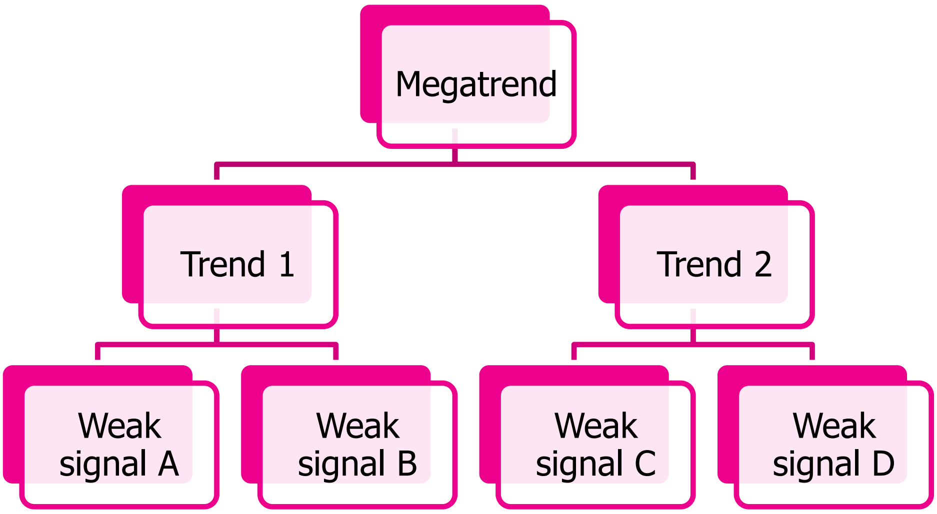

Figure 1. The connections between basic concepts of foresight (Hiltunen 2012, 76)

Megatrends

Megatrends are wide-ranging, powerfully present long-term changes that consist of multiple trends. They extend to different areas of life and are geographically broadly spread and well-known, but not always completely global. While megatrends can shed some light to the future, they are not permanent, but can shift shape or fade away. (Hiltunen 2012, 76-79). For example, Sitra (2020) names climate change, demographic changes, changing economic system, technological revolution and change of social systems as some of the biggest megatrends affecting Finland.

Trends

Trends are also long-lasting tendencies that can form megatrends, if they continue in the future. They begin from new innovations and can be derived from today's weak signals. Trends reflect the change in social tendencies happening now and in the recent past, and those that have strong connections to the history, might keep existing later on. (Hiltunen 2012, 76-102). Examples of trends in work life are changes in commuting, attention to email etiquette, decrease in tiring video calls, increase in co-working spaces, and part-time digital nomads (Cook 2020).

Weak signals

Weak signals are sings of potential upcoming changes and are usually new and evocative issues. People receive a great deal of information and stimuli, and signals can get lost in the flood, therefore they need to be consciously and actively searched for. The nature of the signals is uncertain and there is always the possibility that the weak signals do not become trends but disappear instead. By collecting and connecting weak signals, possible future trends can be drafted and further developed into potential scenarios. (Hiltunen 2012, 108-130.) Sitra's article mentions such signals as an increase in the number of streets only for pedestrian traffic in metropolises (Hietaniemi & Poussa 2020), workplace-activism (Lähdemäki-Pekkinen & Ikäheimo 2020), support for the mental health of the young (Lähdemäki-Pekkinen & Vataja 2020), and recommendation of using recovery funds towards biodiversity (Hellström & Hämäläinen 2020).

Wild cards

Wild card is a change that happens fast and unexpectedly and has wide effects. Powerful impact on the operational environment and the element of surprise makes wild cards shocking and hard to prepare for. Even though it is possible to observe the potential weak signals that predict the wild cards, it seems that due to cognitive distortions that clouds our judgement, the predictions often do not lead to actions that could help react to the sudden changes. (Hiltunen 2012, 138-161). The ongoing COVID-19 pandemic is an example of a wild card, that effects on the course of life. Although a global pandemic was seen as a forthcoming possibility, barely anyone was actually prepared for it, which is why it was such a surprise. (Heinonen 2020).

2 THE FUTURE OF WORK

As the Greek philosopher Heraclitus it expressed, the only thing that is constant is change. It seems inevitable that since the world is always changing the world of work will also change. The future of work depends on multiple issues, and for this reason cannot be predicted very accurately (Toivonen 2011; Oksanen 2017; Alasoini & Houni 2019). Often the changes affecting the future happen over a long period of time, instead of rapid developments. It is important to remember that future developments do not affect all industries and occupations in the same manner or volume (Hoffman, Shoss & Wegman 2020; Oksanen 2017). By investigating the possible changes in working life organizations can try to anticipate and prepare for the consequences. This is also connected to the wellbeing of the organizations as well as the employees. (Hoffman et al. 2020.)

Global megatrends including globalisation, demographic changes, climate change, urbanization, and digitalisation affect working life as well as other aspects of life (Toivonen 2011; Oksanen 2017). Digitalization in itself includes multiple significant trends such as automation, robotics, platform economy and artificial intelligence that influence working life in many ways. Oksanen (2017) names AI as the possibly largest affecting trend, since it has such wide repercussions on different areas of work. Changes resulting from the global megatrends include flexibility of teams and work, decrease in routine tasks and increase in ’knowledge work’, need for continuous learning, blurring of boundaries in the employer-employee relationship, and changes in the social impact of work (De Pruyne & Gerritse 2018; Oksanen 2017).

From the beginning of 2020, COVID-19 pandemic has forced companies to adapt to social distancing, restrictions on assembly and even restrictions on movement. The result for many has been to work remotely from home. This considerable and somewhat unpredicted phenomenon will likely leave an imprint on working life that is now difficult to anticipate exactly. Professionals estimate that trends such as flexibility, mental health support from employers, multi-locality, and coworking are accelerated in the world after COVID-19 pandemic (Cook 2020; Kropp 2021; Berliner 2020; Thomas, Morris & Edgecliffe-Johnson 2020).

2.1 Remote work

Remote work has been increasing its popularity in Finland during the 21st century. In 1997 only 4% of respondents of the survey by Tilastokeskus worked remotely, whereas in 2018 it reached 28%. The growth has been especially strong within the white-collar workers, for example 59% of the managerial employees telecommuted in 2018. (Sutela, Pärnänen & Keyriläinen 2019). The enabler of increasing remote work has been the rapid technological changes over the past two decades (Cheremond 2019). This shows that remote work is not a new trend but has become much more visible during the past few years.

After the beginning of the COVID-19 pandemic, over million Finnish workers swapped to remote work as reported in the survey by Taloustutkimus made for Yle (Pantsu 2020). Already then, in the beginning of April in 2020, it became clear that the popularity of telecommuting will remain high also after the pandemic is over. According to the survey in April (Pantsu 2020), third of Finns wanted to continue to telecommute after the pandemic, whereas in a similar study in July 2020, also by Taloustutkimus (Valkama 2020), the proportion had increased to over half of the respondents.

According to Yle's survey (Kierikka & Nieminen 2021) COVID-19 has placed Finnish workers in very different positions. While others are fed up with remote working, some are forbidden from working from home though their duties would allow it. Also, there are many positions that cannot be transferred to home office, while some knowledge workers are able to choose their location. It is largely the employer that decides the work conditions in a knowledge work position. (Kierikka & Nieminen, 2021). This highlights the fact that not all industries change in similar manner, and trends like this create vast differences in the possibilities of occupations.

Remote work period caused by COVID-19 has shown the importance of trust and communication by employers. Lack of trust has been presented as a reason for not allowing telecommuting in some companies (Kierikka & Nieminen 2021), indicating that some team leaders assume that employees cannot perform unless supervised. Nevertheless, a study shows that approximately over fifth of the workers of matured economies could telecommute from three to five days per week without losing productivity (Lund et al 2021), which could indicate that the fear of weaker productivity in remote work is unnecessary. According to Ruohomäki from Työterveyslaitos, negotiation and planning as well as supporting the employees are key elements of successful remote work (Kierikka & Nieminen 2021).

The COVID-19 pandemic and telecommute recommendations have uncovered also the negative aspects of remote work. The need for ergonomic space and self-management as well as clear routines are present in the remote workdays, and without these, the telework can cause physical health issues, stress and fatigue. Unwanted remote work can reduce the daily face-to-face contacts to none and create feelings of social exclusion especially for those who live alone. (Heinonen 2020.) When work enters home and telecommuting enables distributed teams, creating work-life balance becomes essential for maintaining routines and reducing stress (Cheremond 2019; Cook 2020). It seems that men are more likely to return to the office once it is possible, which could help uphold the existing gender-wage gap (Pantsu 2020; Kropp 2021). These issues should be taken into consideration when and if the pandemic continues, and as telecommuting becomes regular part of working life for companies.

Many experts (Cook 2020; Kropp 2021; McGahey 2021; Thomas, Morris & Edgecliffe-Johnson 2020; Luoma-aho 2021) predict that a hybrid strategy could be the future of work after the lockdown. Hybrid strategy with flexibility of the location in knowledge work could mean for example two days at home, two at the office and one at a third location, providing different options for the employees to choose from. For example, Spotify has announced their new employment program 'Work From Anywhere', which enables their employees to choose their location for work (Lundström & Westerdahl 2021). Employees can choose to work fully from home or from the office, or utilize a hybrid strategy, as well as choose the city and country of the location (with few limitations). This is most likely an indication of the direction to which companies are heading to after the pandemic.

According to Yle’s article (Pantzar 2020), some of the Finnish labor unions are encouraging employees to negotiate suitable work arrangements already during the pandemic, if for example commuting during the rush hours raises anxiety. Reduced commuting time has been seen as one of the benefits of teleworking for the environment as well as for individuals (Hiltunen 2020; Cook 2020) and could affect even urbanization and city planning in the near future (Vaattovaara 2020; Lund et al 2021).

McKinsey Global Institute’s study of future of work after the pandemic (Lund et al. 2021) found that in order to achieve better success, some tasks should be done in person, even though they could be done remotely. Such tasks include for example ”negotiations, critical business decisions, brainstorming sessions, providing sensitive feedback, and onboarding new employees” (Lund et al 2021). Based on this, it might be that the change towards hybrid model of working might alter the work in office space towards collaborative and teamwork tasks. The lockdown has shown that one of the perks of the office space is the social community (Valkama 2020; Fayard, Weeks & Khan 2021), and at the same time, increased desire for flexibility has created a market for co-working spaces (Cook 2020). Upcoming chapters look more closely at the co-working trend and changes in the content of work.

Remote work possibilities can also influence travelling after the pandemic. So-called ’workations’ connect work and holiday location for vacation with workdays (Pöysä 2021; Cook 2020). After few years of looking at the same view from the living room window, work-holiday in an exotic location can sound tempting. Still, video conferencing and virtual solutions affect the need for business travel and after the pandemic, the number of business travels might be approximately 20% less than before (Lund et al 2021). In Finland there has been an increase in cottage sales in 2020 (Hietaniemi & Poussa 2020), which indicates that people still do enjoy a change of location at times and perhaps appreciate an escape from the city environment. These signals indicate that the remote work trial period will continue after the pandemic and develop into more flexible, multi-local and diverse way of working.

2.2 Technology and digital evolution

Technology, along with remote work, is the largest trend affecting the work at the moment. The development of technological solutions affects work environments across different industries, some more than others. COVID-19 has caused a digital leap regarding the remote work, and probably boosts the technological advancements in many fields. Automation, artificial intelligence, robotics, hyperconnectivity, blockchain, and platform economy are some of the concepts that already have influence on working life and continues to affect it with further developments. For example, automation already has rearranged processes requiring routine tasks (Lund et al 2021), and the growth of computing capacity and the increasing data enable the development of exponential technologies (Clauson 2020, 560). The future developments are going to become even faster and thus highlight the individual’s and company’s ability to adapt (Hämäläinen & Vataja 2020; Clauson 2020, 558).

Oksanen (2017, 22-23) presents two potential paths how the utilization of technology could change working life in the future. The first one emphasizes unlimited automation and situation where humans would do only the work that robots or machines could not perform. This would mean fundamental transformation of work, and might lead to a vastly different society, when work is not the meaningful bond to the community anymore. The other path emphasizes the augmentation of automation, and the support technology gives to the work. The nature of work would change even more towards knowledge work and demanding problem-solving.

Whether the future of work leans towards total automation or augmentation of technology, it is probable that the mix of occupations, the nature of work, skills needed, income and career paths change due to these changes (Oksanen 2017; Clauson 2020, 556; Lund et al 2021). These effects are assessed further on upcoming chapters.

According to Lund et al (2021), occupations which include more physical proximity to other people will face greater levels of AI and automation deployment in the future. This possibly fast-tracked leap towards automation is due to the need for social distancing and cost control with lower personnel costs. The deployment of AI and automation will most likely affect the customer service postions, such as salespeople and food service positions, most heavily, and force these workers to change occupations and retrain.

The technological developments, such as Wi-Fi and cloud computing, were the enablers of telecommuting whereas video conferencing platforms enable remote teamwork. The next step could be the utilization of smart screens and virtual and augmented reality solutions in creating more flexible solutions for combining remote work and teamwork. (BCO 2019.) This emerging trend can be traced to the 80s, for example, when Xerox PARC virtually connected their two labs in the US with multimedia technologies (Fayard et al 2021). Social distancing has given an opportunity for developing such technologies further as they are gaining popularity.

Exploiting technology in work can cause inequality between occupations and workers. As stated earlier, not all occupations are suitable for remote work, and those who do not have the money or capabilities to own and use smart devices are not in the same position as those who can. On the other hand, when digital devices and services become more and more common, the situation could turn the other way around: turning off devices could become a right only few can exercise. (Dufva & Wäyrynen 2020.) This should be taken into consideration when building the new work environment.

Utilization of technology creates also concerns around employment and financial stability. Since automation has the potential to decrease the number of certain jobs available radically, employment becomes a matter of creating enough new positions and social structures to support the new kind of working life. (Oksanen 2017, 14-15.) This is also reflected in the need for different skills than before, and one possible solution is retraining and continuous learning.

As technology becomes more integral part of our working life, it brings along security issues. With wider digitalization and Internet presence comes increasing amount of data, of employees and of companies. The control and usage of this data is necessary to establish without privacy violations, and protection against security breaches becomes even more valuable. (Dufva & Wäyrynen 2020.)

When the lines between work and leisure become blurred, the privacy of the employees' home and life should be recognized as an important feature. Also, with increasing co-working spaces where the person sitting next to you might not be from the same firm, information security becomes an issue (Luoma-aho 2021). With the growth of technological solutions, the safety of the individuals and companies grows even more necessary.

2.3 Content of work and continuous learning

As the subsequent future is increasing collaboration between humans and machines, the current structures of work and society will most likely become irrelevant over time. The content of work, company structures and the mix of occupations are going to change with time, and therefore the need for restructuring, retraining and continuous learning are significant processes for companies and individuals. Even though the subsequent future is not certain and can be hard to foresee, the signals and trends are pointing towards more versatile, collaboration based and cognitive work.

Oksanen (2017, 15-16, 26-27) states that as the changes in work are likely to be extensive, they change the structure of our welfare society where the increase of productivity has previously boosted wellbeing and the work has been a tie to the society. Careers at one employer continue to shorten and work is fractured into smaller pieces. In the subsequent future, work and the structure of our society will become even more versatile as the ways of working become more diverse. The segments no longer are children, retired, unemployed and employed, but the definitions in the realm of employment and unemployment become more varied and inclusive. The development of these classifications is necessary for the structures linked to work: income, social support and purposeful living. The form of these changes will be seen as the future arrives. (Oksanen 2017, 15-16, 26-27.)

Short-term contracts and gig economy has been a trend for a while, which according to Clauson (2020, 568-569) has been possible due to the increase of platform economy. Employment platforms in digital form enable the development of work arrangements that currently might seem non-traditional, where the employee has a freedom to choose the work tasks but faces uncertainty of possibilities after the assignment. LinkedIn is launching a gig marketplace for telecommuters and it would enable even salary payments through their website (McKay 2021). This weak signal indicating the development of gig economy could mean more centralized and limited growth of the market.

Technological changes might change the way organisations are formed. When the focus is shifted from the job titles towards the important tasks, the hierarchy and fixed practices shift to more flexible and self-steering communities. Such concepts as employer, workplace and work hours are no longer valid to describe the activity, network and result based work environment. It is possible that the nature of the future organisations become changing and adaptive or even intermittent and short-lived. (Oksanen 2017, 23-24.) In the near future, before above mentioned scenario, likely changes include reduced hierarchy, autonomous teams and more flexible structures of organizations. The flexibility and autonomy can be seen in the behaviour of teams: they are formed independently to fit the skills and knowledge needed for the tasks, and after they are done, proceed to work in other teams or jobs. The skills needed might no longer exist inside the company and are sought from external sources to supply a short-term need. (De Pruyne & Gerritse 2018.)

Rapid employment developments, multiple income streams and increased flexible teamwork blur the lines between employer and employee as well as the lines between different fields (Oksanen 2017, 27). Less strict organizational structures and autonomous teams create new, flexible definitions of employment, and at the same time the operations are not limited to one field. If the subsequent future brings novel employment relationships, it affects the company structures as well. One likely development path is the disappearance of middle management (Cheremond 2019). When the focus is directed towards the activities, skills and teamwork become more important than job descriptions, and the autonomous teams could manage and monitor their activities without external manager. This form supports the fast-paced fluctuations of the markets.

Technological changes, as well as rising income levels, aging population and need for creative technology workers increase the demand for STEM workers and health care professionals (Clauson 2020, 569; Lund et al 2021). The COVID-19 pandemic has forced communities to prioritize the occupations that have necessary in-person activities and health care personnel is one of the most important ones. STEM occupations involve jobs in science, technology, engineering and mathematics, and are relevant for technological advancements and creative solutions. The content of work in these fields is also affected by for example automation and the COVID-19 pandemic, but they most likely continue in high demand.

Lund et al. (2021) estimates that due to the ability to shift from one low-income position to another, the previous growth of the segment will stop and the labour demand is increased in high-income occupations. With the automation processes in the future, this could mean retraining employees in low-income positions to work in higher-income positions. The estimates of needed occupation changes after the pandemic are 12% more than before it, and these changes are more likely to affect those who are less educated, women and belong to ethnic minorities in Europe and USA. (Lund et al. 2021.) This means a major increase in the needed training and also a change in the needed skills.

As the technology, especially AI, develops, together with routine tasks some of the non-routine tasks can be replaced by automation. Since the exact effects on different occupations are difficult to predict, it might be more sensible to focus on the skills that are most likely to be needed. For example, automation potentially frees time for complex problem-solving and collaboration between workers. Creative and expert work needs higher education and as observed before, brings up the necessity of continuous learning and retraining. (Oksanen 2017, 23, 31; Clauson 2020, 562-563.)

The physical office spaces are not likely to disappear entirely in the future since some of the most important tasks are not effectively done remotely. Creative collaboration is often prompted by unplanned, in-person encounters which cannot be replaced by virtual encounters. Unplanned meetings that create creative solutions are more likely to happen when colleagues work close to each other which is why it is necessary for companies to create the possibility and place for these encounters. (Fayard et al. 2021.)

Cheremond (2019) predicts that by the year 2028 cognitive work will be held most prestigious. Work will contain solving complex problems with evolving digital skills, creative thinking, and critical evaluation. Along with cognitive skills, different meta-skills are increasingly important in the changing working life. Alasoini and Hiltunen describe important meta-skills in Ajala (2021), and certain aspects are highlighted: digital skills and media, interaction skills, acknowledging wellbeing, creativity, ethical and sustainable behaviour, resilience and managing entities. These skills support learning, evolving and surviving in the new world of work.

The unpredictable and ambiguous future can raise fear and worries related to work and coping. The important meta-skills help with identification of factors of wellbeing and support the ability to work in insecure circumstances. Especially during the COVID-19 pandemic and remote work era self-management skills such as self-direction have been necessary, and most likely continue to be in the future. (Oksanen 2017, 32.) Even though some of the changes are in the subsequent future, preparation for the extensive developments in the content of work can already begin.

With COVID-19 pandemic the resilience of companies has been tested. Those who were able to adapt and create alternative options were the once who survived well. Development and innovations have always been crucial part of business environment but with the rapid changes in work and the world the scope for action and adaptability become vital. By increasing these features, companies can better prepare and cope with the complex world. Continuous learning and expansion of models of thinking are ways to achieve that. (Hämäläinen & Vataja 2020.)

The pandemic has modified and accelerated the expected changes in the job market. As mentioned before, the labour demand and skills needed have and likely continue switch towards more complex, collaborative and high-wage positions as the technology develops and the content of work changes (Oksanen 2017; Clauson 2020; Lund et al 2021). While it does not mean the end for basic education, it has prompted a need for retraining and continuous learning.

At the moment, it largely depends on the individuals to decide whether to retrain or learn new skills, but as the work changes businesses could offer training to for example those whose jobs are easy to automatize. Focus on the retraining should be on the new skills workers need in more creative and complex positions that are likely to increase in case of automation of processes. (Lund et al. 2021.) This way companies can retain their current workforce while adapting to the changing markets.

Learning and developing skills after graduation is already part of many occupations but as working life changes, the pace and quantity of the learning might increase. Much of the training of workers switching from low-income positions to higher ones needs postgraduate education (Lund et al. 2021). Also change towards cognitive and collaborative work as well as increasingly intricate technological applications could require extensive education in some positions. The education systems could take into consideration the continuous learning and individual paths that the working life changes cause and develop the supporting structures. (Oksanen 2017, 23, 33.) Luckily, these themes are present in the government’s plans, and ideally, they are executed in a way that supports the employment in the long run.

Continuous learning and building resilience can be supported with networking cooperations and perhaps also with the utilization of coworking spaces (Hämäläinen & Vataja 2020). Working and innovating with workers from other industries can enable new and creative solutions that benefit not only one company but a wider network. As the organizational structures and work generally changes towards collaborations and communities, work communities gain extensive knowledge base from which all members benefit. Together networking and continuous learning can enable the expansion of thinking models for individuals and companies.

2.4 Flexible space and work

With the hybrid strategy of working, the flexibility of the work environment is increased. Coworking spaces provide an additional dimension to the work environment possibilities. Not only are they inexpensive solutions for freelancers and small companies looking for office space, but an extension of the office for larger companies. This trend was already existing especially in the US before the COVID-19 pandemic but has now accelerated after it. (BCO 2019.) Together with technological innovations global flexible spaces enable the utilization of distributed teams and multi-locality as well as the reduction of work-related relocation. The use of coworking spaces seems to become more versatile, and thus attract new users.

According to Houni (2019), coworking space is a communal working space which is rented to self-employed people and teleworkers. Recently also public administration and larger organizations have found the benefits of coworking spaces. The company of workers in same or similar fields is seen as an important feature, and this can provide insight and new work possibilities.

In 2020, the amount of coworking spaces was predicted to reach 20 000 globally despite the ongoing pandemic (Di Risio 2020). The estimate for 2024 is nearly 5 million workers using coworking spaces, which indicates an extensive increase in the interest for flexible spaces. The demand for coworking spaces will bring new operators and older ones begin to expand their operations. USA has the biggest market share of worldwide coworking spaces market, but the trend is clearly strong also in Europe and Asia. The increasing competition among the spaces has led to lower average prices globally, but at the same time European prices have gone up almost 12% from 2018 to 2020. (Di Risio 2020.) The upward trend of coworking supports the hybrid strategy of work and aspiration of flexibility.

Coworking and other flexible spaces can form a solution for when the office or home are not viable options. Especially in major capitals, people might live in small apartments. During the pandemic and mandatory remote work, the small living space is interfered with work, and people might long for other options which company’s own or externally managed flexible spaces can provide. (Cook 2020.) According to a study by British Council for Offices (BCO 2019), flexible spaces used by large corporations in the UK can be classified under three main categories: externally managed flexible space, internally managed flexible space and hybrid space, which means partnership of some degree between the service provider and the company. Different models can be used for different needs, and the arguments behind using flexible space can include for example recruiting and retaining talent, reducing financial risks related to real estate, strategic geographic positioning and community spirit. Flexible space models can provide even more adaptability for companies and their employees, thus improving their wellbeing by enhancing work-life balance and help them prepare for the fluctuations of the near future. (BCO 2019.)

The increased use of flexible spaces, together with remote work and changing nature of work, has brought challenges to the managerial work, maintaining employee wellbeing and company culture. With team members in different locations and emphasis on collaborative work, the current management styles might not be suitable in the future. Also, the possible change from hierarchical systems to more task-oriented communities creates need for clear support structure for the employees that is relevant where ever the work is done. (Oksanen 2017, 24; Houni 2019.) With scattered workforce it is tricky to uphold the company culture. Especially in externally managed flexible spaces, the criticism of the lack of formability has been increasing. For employees as well as business partners the visibility of the corporate brand and identity is important for engagement and support. Different strategies of personalization can be developed for greater adaptability. However, it is necessary to consider how long periods are spent in flexible spaces and what is the purpose of using them. (BCO 2019.)

With increased flexibility of workspace also comes the possibility for increasing flexibility of working hours (Kropp 2021). When the focus is directed towards the tasks and activities, measuring employees by their work hours becomes irrelevant. Some timeframes will most likely remain, and with increased collaborations the frames of work are constructed together, but the traditional ’nine-to-five’ -thinking could be forgotten. Freedom to choose working hours also enables the possibility of much debated shorter work week. Spain is the first country to test the 32-hour workweek in September 2021 (Yeung 2021). This could be a signal towards governmental acceptance of flexibility of work.

In the long run, flexibility of working hours and growth of multi-locality can lead to constant availability. If performance is not measured through time but output, the clear separation of work and leisure can become hard to establish. As the workers become more autonomous and self-managing regarding time and place of the work, the changes can form a threat to the wellbeing of the workers. (Oksanen 2017, 24-25)

As multi-locality and remote work become mainstream work options, companies as well as individuals can benefit from increased options of employment. Utilization of distributed teams opens up possibilities that are no longer geographically located in one place but available for everyone with the skills needed. Already in the near future especially knowledge workers can profit from the increased possibilities of career paths. (Lund et al. 2021.)

2.5 Employment and retirement

In the time after the pandemic, the current trends predict some changes in the occupation mix. Customer service roles, including food business, and lower level supporting office positions will likely face lower employment levels, as well as easily automated production, warehousing, and instalment positions. While e-commerce and delivery systems increase the need for transportation, production and warehousing, automation and augmentation of technology as well as decreasing number of low-income positions will disturb the current levels of employment. (Lund et al. 2021.)

The fast developments of technology and the skills needed in the changing world create a need for quick recruitment process. When the changes are rapid and retraining is not speedy enough, short-term contracts will likely gain popularity. Filling the emerging gaps in company skills with temporary employment could shorten and reshape the needed employment contracts even further. (Kropp 2021.)

Demographic changes are included in the global megatrends. This can be seen in various ways in different countries. In Finland the biggest issues are aging population and reducing labour force, decreasing fertility and negative population replacement rate. According to estimations in 2019, the population growth is predicted to shift direction in 2035 and Finnish population begins to decrease. The population of working age is diminishing every year and is envisioned to do so regardless of the population growth. Immigration has provided some support to the naturally decreasing labour force, but the effects are low. (Larja 2019, 42-47.) More recent estimates show that the predicted shift in population growth could happen already in 2034, and the rate of decreasing of the population of work age is predicted to accelerate in 2040 (SVT 2021b).

The current government has set an objective to reach employment rate of 75% by 2023. In March 2021, the employment rate had increased slightly from last year, now being 70,7% (SVT 2021a). Previous measures for increasing employment include for example the expansion of compulsory education and support for raising the employment rate in the age group of over-55-year-olds (Valtioneuvosto 2020). These measures are part of the target to create 80 000 jobs by 2030. In the recent developmental conference, the government decided the upcoming actions, which include for example education supporting the young, higher education and continuous learning, support for ability to work and prevention of work disabilities, and work-related immigration and integration (Valtioneuvosto 2021). All of these measures are relevant for the preparation of future changes, and hopefully bring sustainable growth in employment.

One interesting effect of COVID-19 pandemic has been a rise in retirement age (Järvinen 2021). Employment rate in the age group of over-55-year-olds has been higher than usually in the last year, since people were retiring 5 months later than in 2019. The pandemic has restricted the possibilities of leisure time and thus possibly encouraged working. The pension reform few years ago raised the retirement age and linked it to life expectancy, with the hope of increasing the labor force (Larja 2019, 50). Higher retirement age has brought positive consequences, such as higher pension and employment, but whether the ’natural’ rise has long term effects remains unforeseen.

Although most of the major changes happen during a long period of time, job creation and other effective employment measures are needed to support the current situation. When and if the increased automation and augmentation of technology shrinks the amount of existing positions, creation of jobs becomes even more significant factor in employment. It remains to be seen how well the Finnish government and EU regulations are able to support the changing working life and the structural changes it brings.

2.6 Employee wellbeing and social aspects of work

The pandemic has highlighted the importance of worker wellbeing. Perhaps now more than ever, the support for mental health has been seen as an important perquisite for employees who have had to adapt to the uncertain working life. Most likely at least some companies begin to increase and expand their mental health support for employees and, perhaps this kind of support becomes normal benefit. (Kropp 2021.) Private mental health services could see an increase in demand in the near future.

As mentioned before, meta-skills supporting coping at work and wellbeing are crucial in the future (Oksanen 2017, 32). With increased flexibility and rapid developments in the work environment, recognizing the factors affecting wellbeing is relevant. With good meta-skills employees can act before the situation goes too far. Also, employers could be educated to recognize the signs of burnout and other issues in the behaviour of employees and thus support them better.

With the prospect of multi-locality and distributed teams arrives the potential downsides. Especially during the pandemic, when most work is done via digital platforms and away from the colleagues, feelings of loneliness and isolation can occur. Support for mental health and coping in remote work is needed from companies offering hybrid-work strategies. (Berliner 2020.) Technology that enables remote work and flexibility also creates the illusion of constant availability. E-mail and messaging applications enable receiving work-related content around the clock, which can lead to exhaustion and blurred boundaries between work and leisure. Though this wider availability is possible and work hours can be flexible, the work-life balance should be respected by employers as well as colleagues. (Cook 2020.)

While increased flexibility and multi-locality has its benefits, the relationships between colleagues might suffer. Virtual meetings cannot support emotional connections and they diminish the interpretation of body language and nonverbal communication. Physically meeting co-workers and clients reinforces social ties to the work community and fulfils the human need for closeness. (Fayard et al. 2021.)

Work could be divided into two categories: work which is performance of tasks for payment, benefits and career development, and meaningful activities done for the values they represent. Quite often the latter one is something that is done without salary. (Oksanen 2017, 19.) Lately these categories have begun to connect, and possibly already in the near future this is expected from most positions. Employees are more often looking for ways to include their social values into their work, and thus contribute meaningfully to their environment. Therefore, employees are looking for companies that enable such social aspects and demand positions that resonate with them (Cheremond 2019.) According to Kropp (2021), companies need to contribute to social issues to gain, retain and motivate their workers. Supporting signals for increasing social values of work are millennials, who expect more actions and social influence from corporate leaders, and increasing workplace activism, which could draw attention to the wellbeing of workers and environment (Hellström & Hämäläinen 2020; Lähdemäki-Pekkinen & Ikäheimo 2020). Corporate social responsibility has been relatively popular aspect, but as these signals and trends suggest, it begins to increase its value.

Work is an important structure associated with connection to the society and attaining own role in life. The current economic situation and the forthcoming developments in the labor market fracture the current tie between individual and society. In the subsequent future work might not provide relevant inclusion and the risk of marginalization is increased with the current definition of work. The new description of work might be related to communities with similar ambitions and value creation through purposeful activities. Networks and social relevance could become the defining elements as well as creativity, since those cannot be automized. New supporting structures and the new meaning of work are created with the future changes. (Oksanen 2017, 34-36.)

3 CORPORATE REAL ESTATE AND BUSINESS PREMISES

3.1 Corporate real estate and business premises development directions

Remote work, technological changes, varying content of work, increased flexibility and changing structures are all part of the new world of work. These trends are affecting companies and entrepreneurs in many industries and therefore also affect office space providers. Corporate real estate and business premises reflect the changes in their users, and thus these providers must be able to present the most suitable locations, spaces, amenities and services in order to be viewed as an important asset by the clients. The trends in the industry are in many ways developing and growing with the global megatrends but also local issues need to be acknowledged.

When the pandemic is over and telecommuting is not mandatory, the migration back to offices begins. In a study by Leesman Index (2020), the results from surveys of home-office settings and regular office settings indicates that the higher the satisfaction with the office was before the pandemic the more days in a week employees would estimate to work there in the near future. This shows the value of suitable and functional spaces and highlights the need for user-centric design. When the office space meets customer expectations and requirements, the space is also viewed as necessary. By observing current trends and weak signals, some development directions can be found.

3.1.1 Environment, climate change and employee wellbeing

Climate change is a megatrend that has been present for many years, but the actions taken to fight it have been slow. The reconstruction of ecological sustainability is mentioned to be the most important megatrend affecting our future (Hietaniemi & Poussa 2020). It is a fact that affects the construction industry, renovation industry, business and office building owners and managers as well as the users of those buildings. While it has not been overly present in the industry materials, the scarcity of materials and resources along with other issues of ecological crisis touches the corporate real estate business as well.

During the pandemic and social distancing nature has increased its importance in the lives of many Finns. The proximity to nature has always been present but when avoiding contacts became essential, it was embraced more. (Heinonen 2020.) This could have also impact on business premises and the vicinity of them. Biophilic design and green spaces around the buildings reinforce the connection to the nature and thus enhancing wellbeing. Biophilic design has been a trend for a while, and it can be seen in the material choices, colours, favouring natural light, outdoor space and views from the windows as well as plants used for decorations. These factors affect for example air quality, productivity, noise levels and overall wellbeing of workers. (Holtman 2018.) This approach is part of the WorldGBC's (2016) framework for healthy and green offices. The framework includes eight characteristics of the office environment, measuring the experience of the building, and six economic features to assess. The environment characteristics are "air quality and ventilation, thermal comfort, daylight and lighting, noise and acoustics, interior layout and active design, biophilia and views, look and feel, and location and access to amenities" (WorldGBC 2016). All of these features are based on scientific proof that they improve wellbeing and productivity of the employees. Case studies provided in the report show that offices with green certificates and green characteristics increased for example productivity, retention rate and concentration as well as decreased absenteeism. (World-GBC 2016.) With the strong connection to the nature and climate change being as important as ever, biophilic design and green thinking does not disappear in the near future but might become even more important features for companies looking for business premises.

As the health of employees has been highlighted during the pandemic and in some companies even before that, the corporate real estate is expected to be supportive also. Work environment should support comprehensive wellbeing of employees and prevent exhaustion. Spaces supporting relaxation, bike commuting, meditation and physical wellbeing are examples of health promoting design. (Luoma-aho 2021.) With the COVID-19 pandemic, cycling became popular commuting form. This trend could be continuing also after social distancing is over (Heinonen 2020). Facilities supporting bike commuting such as bike racks, and showers and changing rooms will likely stay necessary. France could be the first country to provide financial incentive for citizens to change their old cars to electric bikes (Reuters 2021). With 2500€ reward for taking old car to the breaker's yard, buying expensive electric bikes is made easier. This is a positive signal for reducing carbon dioxide emissions and increasing activity of workers. A study by Appel-Meulenbroek et al. (2018) showed some indication that gym or other fitness facilities were perceived as somewhat important. Operator specific predilections could be studied for more exact and practical results.

The office is not just for working, but also creating a work community and bonds between workers. Meeting co-workers in person reinforces existing relationships and supports the basic need of belonging. The community of the workplace is necessary base for collaboration, productivity and overall wellbeing of the workers. (Fayard et al. 2021.) Especially after the pandemic, workers most likely want to reconnect with others at the office where shared spaces and coffee and tea facilities could be areas for this.

Healthy and versatile food available in a good price could support the change back to the office as well as help support employee wellbeing. In 2019, one-third of Finns of working age were eating at a canteen daily (THL 2019). The pandemic reduced the opening hours of restaurants as well as the admissions, but perhaps the ease of going to the canteen near or at the workplace could be attracting workers back to the offices (Eskola 2021). This offers restaurants and canteens as well as office space providers opportunities to develop the food and drink service selection.

3.1.2 Flexibility and resilience

During the pandemic companies that have shifted towards remote work have seen the financial benefits of reducing office space (Thomas et al. 2020). As stated by Putto in an article by Luoma-aho (2021), the density of the office has seen an increase in the past few years, with space requirement reducing to ten square meters per person. According to some estimates, companies will scale down around 30 % of their office space due to the increase in remote work and possible utilization of a hybrid strategy and multi-locality (Lund et al. 2021). While it seems quite likely that some reduction will inevitably happen in the utilization rate of office spaces, the movement towards more spacious offices and task-oriented spaces most likely has some balancing effects (Thomas et al 2020; Luoma-aho 2021). Effective teamwork and collaboration needs trust and relationships between team members. Office provides a suitable environment for encounters and meetings and therefore supports collaboration. Even if companies would reduce office space, space for social gatherings is needed to sustain relationships and company culture. (Fayard et al. 2021.)

According to Rytkönen at Luoma-aho (2021), after the pandemic spaces are designed in action-based manner, not to fit all tasks to one space. Knowing what each role requires and creating options for different jobs becomes important. As the work shifts towards teamwork and problem-solving, spaces fit for collaboration and concentration are necessary. Other possible additions to office space could be showrooms, well-equipped videoconferencing rooms, and relaxed meeting spaces. Also, uninterrupted work should be enabled with quiet spaces. Company headquarters could begin to move towards smaller and brand-centred premises, with focus on social functions. The main office could represent brand image and support strategy while providing space for client meetings and employees. Collaboration, strategy development and shared values are present in the headquarters' operations. (Luoma-aho 2021.)

Supporting the notion of action-based office design, Leesman study (2019) shows a connection between internal workplace mobility and work settings, and the complexity of job activities. This means that the need for various settings for work is related to higher number of work related activities. Therefore, it is necessary to support the different roles that are working at an office with range of spaces. One important view from the study was that even though the open-plan office has been popular, the need for quiet spaces for thinking, reading and focused work are needed (Leesman 2019). This suggests that the task-oriented approach to office space might be suitable for companies with differentiated employee roles.

Leesman Index (2021) can be used to measure employee experience at workplaces through questions about work activities and workplace impact as well as the importance and satisfaction of the physical and service features. Accumulated data from the Index shows that most important physical and service features include desk (84,4%), chair (83,3%), tea, coffee and other refreshment facilities (77,2%), small meeting rooms (77,1%), and temperature control (76,5%). While desk and chair are rather obvious choices, other features in the top five tell something about the amenities wanted in the workplace. Refreshment facilities can be seen as essentials for the workday, as especially coffee and tea are generally connected to breaks, client visits as well as concentration (Leesman Index 2018). In 2020, the average consumption of roasted coffee per person in Finland was 9,3 kilograms (Kahvi- ja paahtimoyhdistys s.a.). It could be concluded that the facilities for making or drinking refreshments are clearly wanted feature and important for the satisfaction to the workplace. Small meeting rooms in the top five could indicate the need for a space for team meetings or private conversations away from the workstations. After the pandemic, the number of online meetings might stay high and also this could be seen in the necessity of small meeting rooms. Temperature control is a practical feature and important for the wellbeing of the employees. Control over the temperature could increase the comfort of the office space. These features point that the office should provide user-centric and supportive spaces and services.

As stated before, the office space supports the occurrence of unplanned encounters necessary for creative problem-solving and innovations (Fayard et al 2021). By creating opportunities to run into other colleagues, the probability of natural encounters will increase. This could be done by utilizing the corridors and lobby areas as informal sitting or meeting areas, spaces where people would meet impromptu. As Blomqvist states in Luoma-aho (2021), these areas should not be forgotten, even though they do not have clear strategic purpose. Also, Leesman Index has recognized the importance of the entrance areas: according to the CEO of Leesman, the atriums and other communal areas are the main difference between companies with high and low scores in the Index (Morgan 2016b). This also shows the importance of the seemingly low revenue-yielding spaces in the office buildings.

If the content of work along with company structures becomes collaboration-oriented and teamwork-based, the offices need to support such elements. Leesman Index (2020) study shows some indication that collaboration and formal meetings are more effectively executed at the office than at home. This could suggest that the office space in the future should support both unplanned and planned collaborations and meetings. According to a Delfi-study (De Pruyne & Gerritse 2018), the office environment should support the creative and innovative work with the aesthetics of the space. Colours, materials, and design are still important factors for the usability of the space, even though the functionality is often highlighted. Well-designed spaces are welcoming and, at best, inspiring.

With the rapid fluctuations of markets, shorter work contracts (Oksanen 2017) and multi-locality, the need for office space could be a constantly changing variable in the future. Flexible spaces provide an important asset by offering availability of space when needed, and thus enabling quick adaptation to the changing conditions. Renting space with shorter lease-agreements or in "pay-as-you-go" -manner might see an increase along with the flexible space. (BCO 2019.) In order to be resilient in the changing markets and working life, organizations need to be able to adapt quickly. Innovations, co-operation networks, continuous learning and flexible teams are factors affecting resilience (De Pruyne & Gerritse 2018; Hämäläinen & Vataja 2020). Flexible spaces and lease-agreements as well as supporting structures and services at the office building can help support the companies that operate in them.

3.1.3 Multi-locality

When work enters home, the boundaries between work and leisure become harder to distinct. In the near future the situation is increasingly reversed: the office spaces are becoming more cosy and inviting. This could mean an increasing demand for casual spaces such as social or communal spaces and lounge areas. (Luoma-aho 2021.) Therefore, also the work environment is blurring the work-life balance. This can present problems if it means constant availability or alertness but can also create leisure opportunities such as afterwork events.

Coworking and flexible spaces have seen a wide increase in demand recently (Di Risio 2020). The estimated growth is bringing them available for almost everyone. These trends could be seen in knowledge work as a catalyst for multi-locality. With the reduced office space, workers still need space for collaboration and independent work outside of home. Externally or internally managed flexible spaces could be suitable solution. Their location might be closer to the employees than the office while still providing necessary amenities and spaces for work. (BCO 2019.) However, Kuopio has very limited amount of coworking spaces, unlike other major cities in Finland. This could mean that this trend is only arriving to the cities smaller than metropolises, at least in Finland.

The pandemic and increasing remote work are evidently decreasing the need for office space in knowledge work companies. As employees are telecommuting, the office is focused more on teamwork and brand identity. Even though the cubic meters rented are cut down, the needs of the occupants are taken into consideration better, thus increasing the variety of space needed. (Luoma-aho 2021.) Together with the growing flexible space market this is creating a pressure on landlords and business premise owners to increase their service supply and react to the changing customer needs. By offering multiple locations and variety of spaces, the commercial real estate businesses can compete against the competitors. Multi-locality, flexible spaces, networking, and action-based design are popular trends in the market and continue to affect it in the near future.

3.1.4 Urban design, smart cities and technology

By the year 2031, Kuopio will see its first residential area with its own service concept, Kotikatu365. Health City Finland Oy builds apartments, common facilities, parking facilities and a kindergarten to Hatsala area. The common facilities include for example living room, gym, teleworking spot, and conference room. Residents can also use the joint use equipment, such as a car or tools, and choose such services as cleaning or food delivery service. This apartment concept aims to increase sense of community and wellbeing, and fight against loneliness. (Patrakka 2021.) Since the boundaries of the office and home are slowly blurring, and such concepts as Kotikatu365 and increasing number of flexible space providers are appearing, it is even more necessary to create appealing office settings in order to attract workers to use the offices. The conference rooms and teleworking spots at home or close to home create competition to the traditional offices.

A city development project at Kuopio’s Savilahti area is planned to evolve as a communal living, studying and working neighbourhood. It is projected to include a city-like service centre with all the necessary services close by. The project includes investments in the work environment and is planned to increase for example the skilled workforce available, collaboration possibilities and support for entrepreneurship. (Savilahti. 2021.) As KPY Novapolis is located at the heart of Savilahti, the development project will improve their operational environment. An interesting aspect of the project is the development of Smart City-platform, which will provide information to the interest groups. Data provided includes for example information about traffic, smart lighting, building automation, and anticipatory maintenance. This data generated, possibly connected with sensor and analytical data from their own buildings, can help business premises to adapt and improve their services in order to provide better customer experience. Smart City-platform could support the wellbeing and connectivity of the Savilahti area and its companies. (Savilahti. 2021.)

The pandemic, remote work and the use of flexible spaces is predicted to change the city structure. Current weak signals indicate that possibly more streets could be turned into pedestrian and bicycle streets in city centres of major capitals. According to Bliss (2021), twenty-two of the cities in the US that closed streets from cars during the COVID-19 pandemic are considering keeping them closed. The city centres will see an increase in flexible spaces and the office buildings most likely become open for public even more than before. With a dense city structure, the need for commuting would be minimal and easily managed with public transportation, thus lowering the carbon dioxide emissions. (Luoma-aho 2021.) According to Harris (2015), already six years ago the possible trend of integration could be seen, as similar support and high service levels were expected from the surrounding areas as from the office space providers. The offices are more and more integral part of the neighbourhood, as they blend into the service supply of the area. Therefore, it would be important to offer memorable workplace experiences and support for needs in work and life at the public premises (Harris, 2015). However, this integration and density is in conflict with the current trends of dispersed urban design and popularity of private car use. Despite the noble idea of fighting climate change with dense cities, the COVID-19 pandemic and the possibility of other upcoming pandemics are reminders that the closer we live, the easier the diseases are spread. (Vaattovaara 2020.) Vaattovaara (2020) refers to an article by Camilla Cavendish, which suggests that the cities could become wider and scattered with growth outside city suburbs where all amenities could be found. As the current construction follows the current political trends, it is hard to foresee what direction urban design planning takes in the future. Still, it is clear that business premises are essential part of the city structure.

According to Berry & Feucht (2020) corporate real estate operators need to form digital presence in order to gain resilience. Digital occupant experience and other digital processes are needed for agile adaptation and flexibility, which were highlighted during the pandemic. Analytics, cloud technology and other digital tools can be used to provide better customer experience and efficient processes, when a clear strategic plan is formed. Sensor technologies are already utilized quite often but real estate companies could still improve how they use the collected data. Creating better occupant experience with shared sensor data is possible when the data gives information that can be used to create custom-made solutions. With the growing digital and Internet presence the relevance of security is increased. Cyber attacks and security breaches are considered to be a major threat to corporate real estate companies. Investments to data security should be made as the digital evolution occurs. (Berry & Feucht 2020.)

3.2 Benchmarking of foreign office space providers

Business parks, serviced offices, hot-desking spaces, coworking spaces, and incubators are some of the service providers in the commercial real estate market. With the changes in the demand of business premises, the service providers are creating innovative solutions to respond to these changes. As the serviced office and business park market is quite fragmented, the generalization is difficult (Appel-Meulenbroek et al. 2018). Still, it seems that the basic offerings are quite similar: desks or offices in good locations, meeting rooms, cafés or kitchen facilities, WiFi, and some basic amenities such as printing. Therefore, the following chapter looks at different flexible space providers and business parks from Europe, USA and Asia-Pacific to provide some direction of the range of services offered by companies in the commercial real estate business. The services and facilities are cathegorized according to a division used by Bohm (2017) with the addition of group 'basic facilities and services'. The other groups include 'flexibility and control', 'fitness and health', 'positive distraction' and 'access to nature'. A chart listing the offered facilities and services can be found on Appendix 1.

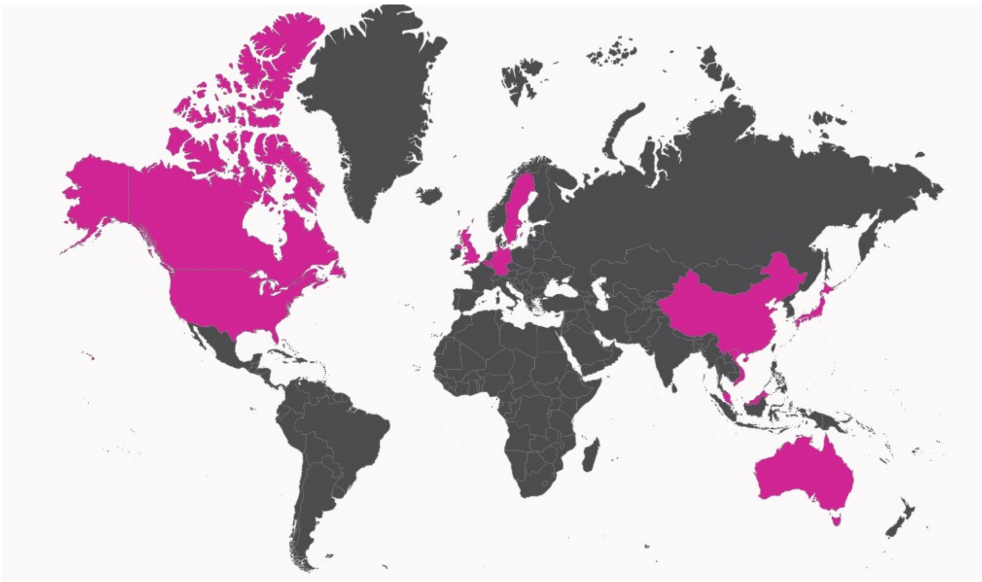

Figure 2. Countries in which Breather, Industrious, Fora, No 18, Cobalt Park and Compass Offices have locations (adapted from amcharts.com 2014).

Breather and Industrious

Breather is a Canadian-based company that offers office spaces on-demand with hour-, day- or monthly fees. The Breather platform enables renting office space online via their app or through an account manager, and the access to the space is handled with a code provided in the app. (Breather 2021.) In 2019 before the COVID-19 pandemic, Breather had 0,7% global market share in the flexible space market, being the third largest individual operator in the market according to a publication by GCUC (2019) referred by Statista (2021). The spaces provided are furnished and have a Wi-Fi connection, whereas other amenities depend on the location. The possible amenities can include for example whiteboard, kitchenette, refreshments or flatscreen TV. Breather rents the spaces straight from the landlords. (Morgan 2016a.) They provide flexible terms, meaning that the spaces can be rented from hours to longer periods and there is no lease agreement (Breather 2021). Their concept utilizes office space that is not used by the landlords, which could be profitable especially now if companies are reducing the square meters they are renting. Technological presence is part of their competitive advantage, since the booking and entry are enabled through their app. Another advantage is the privacy of the space: it is not a coworking space or company office, but a private space for focused work.

Breather has been bought by Industrious, which is an office space provider mainly operating in the US market (Industrious PR team 2021). With the company purchase in May 2021, Industrious can benefit from the established brand image Breather already has as well as from the technology they utilize. The fast-growing company has seen large investments in 2020 and 2021 and is planning to increase their service range as well as customer base with these investments. (Industrious PR team 2021.) Industrious operates currently in 21 states in the US as well as in Singapore, Manchester and London (Industrious 2021b). Their products include dedicated desks, offices, suits, customized office space options, and access membership options. Common amenities at their locations are wellness and conference rooms, office supplies and printing as well as WiFi. Mail handling, community events, breakfast and coffee service, cleaning and location specific manager are included services at their buildings. (Industrious 2021a.) Some amenities depend on the building, and these can include for example outdoor spaces, restaurants or other dining options, fitness centres and event spaces. (Industrious 2021c.) Industrious has multiple flexible space options and their approach supports both multi-locality as well as centred headquarters. Their product range targets already a wide variety of customers which could become even wider with the Breather –platform. The combination of coworking and private offices provides upgrading options, while the designs are described as professional.

Fora

Fora is a company offering co-working and flexible workspaces in London; it was founded in 2016. As its name is derived from Latin and refers to multiple meeting places, Fora has 12 locations around London at the moment and more opening in the future. (Fora s.a c.) The company was voted as the 20th best medium-sized company to work at in London this year (Best Companies 2021). Fora's smartly designed spaces can accommodate large variety of customers from individual workers to teams and larger companies. Their products include owned offices, customized owned offices, owned desks, open desks and team passes, and all options include access to the building specific and Fora-wide amenities. Basic amenities that are present in many of the locations are stocked kitchen including tea, coffee and snacks, meeting rooms, lounge areas, reading rooms, roof terraces, and wellness facilities. Building specific facilities can include event spaces, gardens, secure bike storage, screening room, podcast studio and club room. Their customers benefit from hospitality-type perks, such as weekly resident drinks and events, free tyre repair kits and customisable wellness packages. The Fora app includes features for reserving meeting rooms and booking wellness classes, access to client benefits and events, managing arriving guests as well as connecting with Fora staff. (Fora s.a. a.)

Fora's approach to real estate business is somewhat hospitality and wellness focused, which is logical since both of the founders have background in the hospitality field (Fora s.a. c). Their wellness services for their tenants include a wide range from for example fitness studios and lessons to meditation and therapy services (Fora s.a. b). The interior design utilizes a lot of biophilia-elements and pastel colours, giving the spaces a pleasant atmosphere. In the global scale, Fora is a quite small flexible space provider, however, it seems to have a well-executed concept, and their wellness-focused approach is as current as ever.

IWG and No 18

Headquartered in Switzerland, the real estate holding group IWG operates in over 100 countries with over 3300 locations according to their website. They claim to be the largest flexible space provider, as their brands include companies with business centres, offices, and co-working spaces in many markets. (IWG 2020b.) Their brands are categorized into three: serviced office and coworking, which includes majority of the companies, commercial real estate brokerage, and managed conventional office space. (IWG 2020a.) It seems that their brands have slightly different markets, and they have adapted their concepts to the different needs of these markets. For example, Biz Dojo has only locations in New Zealand (Biz Dojo s.a), whereas Stop & Work by Regus is only located in France (Stop & Work s.a). Their best-known company is Regus, which was the largest individual flexible space provider in 2019 (GCUC 2019, according to Statista 2021). According to their shareholder information, their second quarter in 2021 saw growth after the difficult times caused by the pandemic (IWG 2021). This shows that their markets begin to recover and that they're concepts and companies are flexible enough to adapt to the changes in the market.

One of IWG's serviced office brands is No 18, a clubhouse-styled company offering office space in premium locations in Stockholm, Atlanta, Singapore, Berlin and Gent. Their products include private offices, private desks, and an access membership. Other services available at their locations are coworking spaces, conference rooms, lounges and restaurants as well as event spaces. In order to provide a better customer experience for their members, No 18 has expanded to services such as photography studios, accommodation at their locations and benefits from regional restaurants, spas and other locations. (No 18 2018.) Based on their website, No 18 has a clubhouse -feeling, as their concept relies on worldly, almost old school -styled design and art. This provides a feeling of luxurious and welcoming atmosphere, and according to their website, their goal is to 'inspire, enrich and restore' (No 18 2018).

Cobalt Park

Cobal Business Park is located in Newcastle, United Kingdom, and is, as the name suggests, a business park. They offer mainly office space, but also have data centres, industrial, manufacturing and warehousing space, as well as serviced office space. (Cobalt Park 2021c.) Cobalt Park is among the largest business parks in the UK as they have 40 buildings in almost 16-hectare park where they are located. They are a home to different sized companies from global enterprises such as Procter & Gamble and Siemens to smaller local companies. Their on-site amenities include for example multiple coffee and food options such as Starbucks and Tesco, a nursery, a spa hotel and a hospital. (Cobalt Park 2021a.) Along with these amenities, multiple other benefits are offered. The park around the business park offers walking and cycling paths with nature scenery. Other activites on-site are for example gym, running club and netball team. (Cobalt Park 2014b.)

Their tenant benefit card called More Cobalt offers renting of bikes and cars as well as shared commuting possibility. Community events are frequently arranged at the Cobalt Park, however, during the pandemic, it seems that they have had to decrease them. A pop-up restaurant concept, Tasty Thursdays, brings different food options every week to their tenants. Regular cycle hub encourages employees to commute by bike, and guided walks around the park offer different routes monthly. (Cobalt Park 2014b.) More Cobalt -card has also discount in categories such as food & drink, travel & accommodation, health & fitness, shopping and activities (More Cobalt 2021.) Cobalt Park's large premises and tenant base enable them to provide many benefits and build a community that extends outside the office.

Compass offices

A flexible space provider Compass offices was founded in Hong Kong in 2009. Their over 40 serviced office centres are now spread around the Asia Pacific area, more precisely in Hong Kong, Melbourne, Sydney, Tokyo, Singapore, Manila, Ho Chi Minh City, Shanghai and Kuala Lumpur. Their products include flexible office space, meeting rooms, co-working space, virtual offices, as well as supportive business services, asset management and IT-support. (Compass offices 2021b.) They also offer tenant benefits to their clients, such as discounts from moving services, hotels and Uber in certain locations (Compass offices 2021a). The business services and support can help companies with their daily functions but also when expanding to a new market with these Asia Pacific locations.

Their website puts emphasis on Compass office's IT-infrastructure and their prime locations. Along with regular serviced and co-working space they offer multiple virtual office options from only business address to address, call and mail handling, and access to meeting rooms and serviced office (Compass offices 2021d). Other flexible options are day office or hot desk at a co-working space. They also offer customizable office space solutions to companies who wish to tailor their offices to suit their needs. (Compass offices 2021b.) The supportive business services are implemented in co-operation with Marbury, and their focus is to ease the operations of the tenants (Compass offices 2021a). These services include wide selection of back-office processes from company formation, secretarial services and accounting to working visa processes, fund administration and corporate consultation (Compass offices 2021c). As is clear at their website, Compass offices' aim is to assist and support their tenants with their operations. It seems that their products could support especially those who are looking to expand to APAC area.

4 CASE STUDY

4.1 Introduction

The commissioner for this thesis is an office space provider KPY Novapolis (later Novapolis), which has three business hub locations at Kuopio area. With around 200 companies and 15 000 keyholders Novapolis is the largest operator in the business premise field in Kuopio area. A community of small and medium companies, schools and public sector operators provides a modern workday experience to its versatile customer base. (KPY Novapolis s.a.e.) Novapolis is owned by Osuuskunta KPY which is a cooperative with holding companies located in Eastern Finland (KPY 2021). Services of Novapolis include private offices, conference rooms, lobby and other campus services, office furniture services, restaurants, parking and services of partner companies. The services of partner companies include for example labour force pool Pondi, Sisäpiiri-discount program, wellbeing service Auntie, K2 carwash, padel-field, hair salons and massage services. (KPY Novapolis 2021c; KPY Novapolis 2021b.) Newer additions to the supply of services are community events such as Origo Live -networking events, Novapolis Sport Club and Novapolis Afternoon club (KPY Novapolis s.a.d). Upcoming launches include Novapolis Cowork opening to Microkatu campus and a serviced office concept NovaOffice opening to Viestikatu campus. (KPY Novapolis s.a.b)

According to the new strategy KPY published on October 2021, Novapolis is part of the second half of the strategy, KPY Nova. KPY Nova -strategy is focused on developing Novapolis' position as the trendsetter of the new workday experience and a business hub that attracts professionals. Therefore, KPY is investing into new services and working environments that enable the new way of working. (KPY 2021.) In order to gain knowledge of the changing working life and the services that customers want in their work environments, the research part of this thesis was a survey to the tenants of Novapolis and also to potential, external clients. The focus on the survey was on the factors from the theoretical background that are most directly linked to the utilization rates of the business premises. The development directions of the operational environments are affecting also the corporate real estate businesses, and by estimating the possible changes in the future, Novapolis can make more informed decisions regarding their investments (Toivonen 2011; Harris 2015).

The two research questions for the survey were Q1: How the end-users (employees of the tenant companies of KPY Novapolis and potential future tenants) view their working life will change in the next three years and Q2: What services would the end-users utilize if they were offered in the workplace. These questions were chosen to provide information on the future developments in the use of services and spaces among potential and current clients of Novapolis. The current and upcoming trends in working life and corporate real estate affect the operations of tenant companies utilizing Novapolis' spaces. According to a study by Appel-Meulenbroek et al. (2018), multiple services or amenities that were offered at serviced offices were not perceived as important by the end-users. Therefore, it was necessary to investigate the preferences of the current and future tenants of KPY Novapolis to find out whether they would use certain services. The themes of the survey were derived from the theory base, and the services mentioned in the survey were adapted from the benchmarked companies and included also services that the representatives of Novapolis were interested in including. The themes included remote work; multi-locality; activities in the workplace; changes in work competences, business travel, work-life balance, and meaning of the community; and workplace qualities and services.

4.2 Research methodology

Quantitative research methods provide numerical data, that can be generalized to the basic population that the sample represents. This research method requires a large sample size as the numerical data is statistically analysed. The main aim is to describe the current or future situation and possibly establish causality between variables. (Heikkilä 2014.) The research questions in this thesis were approached with quantitative approach as the purpose was to explain and anticipate the changes occurring in the working lives of the end-users and investigate the current opinions of the end-users in a numerical form. Surveys are typical data gathering methods in quantitative research (Heikkilä 2014). Contacting the current and potential end-users with a standardized online survey was chosen due to the ease of collecting an extensive amount of responses in a short period of time. Other benefits of online surveys are the efficiency of the data gathering as well as the availability of the analysis methods and softwares. On the other hand, the online questionnaires present challenges regarding the possibility for misunderstandings, how honestly and carefully respondents answer and non-responses. (Hirsjärvi, Remes & Sajavaara 2009, 193-196.)

The online survey consisted of three parts: the background questions, questions about the future of working life and questions about services that could be offered in the future. The total number of questions was 12. Apart from the background questions, the questions regarding future of working life and services were not mandatory, and therefore, the number on responders differed depending on the question. The questionnaire was both in Finnish and in English, and it was made with Webropol 3.0 -survey and reporting tool. The survey was anonymous and did not include questions from which the respondents could be identified. The questions were mostly quantitative by nature and included multiple choice and Likert -scale questions. Four multiple choice questions in the questions regarding working life and services included the option 'Other', which required an open answer. This qualitative option was included with the purpose of gaining answers that were not obvious from the theory base but were perceived important by the end-users (Hirsjärvi et al. 2009, 199).

The survey was open for two weeks at the end of October and beginning of November. The questionnaire of the survey can be found in English on Appendix 2. In order to analyse the data, it was transported to Excel for evaluation and forming figures after the survey had closed. The quantitative data was evaluated mainly by analysing the frequencies and percentages in each question since most variables were nominal by nature. Means were calculated where applicable. Questions regarding the current and future remote work (questions 4 and 5) were cross-tabulated with the position at organization for more detailed information. Cross-tabulation was applied also in question 11 with services wanted in the workplace and the age groups of the respondents. The qualitative data resulting from the open answers was categorized into similar groups according to the content of the answer (Vilkka 2007). The uncategorized data from the open answers can be found on Appendix 3.

As the starting point of the survey was to reach two different populations, these populations had different sampling methods. In order to reach the employees of the tenant companies of Novapolis, the questionnaire was sent with customer relationship management (CRM)- tool to practical and communications contant persons of the tenant companies at Novapolis. The cover letter included a request to forward the questionnaire to all the employees of the company to gain as many responses as possible. This non-probability sampling that is closest to convenience sampling method was the most suitable way to reach the employees of the tenant companies with the resources available for this research. The practical and communications contact persons are the way Novapolis communicates with their clients in email form, and therefore this was the most natural way to approach the employees of the tenant companies. The survey link and the cover letter were sent with the CRM tool to 347 recipients when the survey opened and a reminder message was sent to 352 recipients when the survey had been open for a week. The increase in the recipient number is due to new tenants moving in at the beginning of November. Even though these new tenants had shorter period for answering, they were included in the recipient list to possibly increase the number of responses.

The survey was also posted to the social media accounts of Novapolis in order to reach potential clients that are not yet tenants of Novapolis, and thus gain different perspective to what direction the supply of services at Novapolis could be developed and provide a point of comparison for the results. This self-selection sample is also a non-probability sampling, and therefore does not provide results that can be generalized to a large basic population (Vilkka 2007). The total numbers of respondents when the survey was closed was 119. However, only two of the respondents were from non-tenant companies. Comparing the results with only two external responses would not be possible and for this reason these two responses were left out of the final results. After this, the total number of responses that was taken into consideration was 117.

As the survey was posted on social media, and thus open for anyone to answer, and the survey was asked to be forwarded inside the tenant companies, a sample size cannot be calculated. One aspect of quantitative research is that not all respondents in the sample are reached or do not answers leaving the actual response rate lower than anticipated. The amount of non-response depends on the research subject and the target group and can rise up to 70 to 96%. (Vilkka 2007.) Since the sample size coul not be calculated, a response rate could not be formed. If the number of responses could be compared to the recipients at the tenant companies of Novapolis, the response rate would be 33%. However, it should be noted that it is not known whether all of the respondents were practical and communications contact persons. Some of the recipients might have sent the message forward in their companies, or some of the employees of the tenant companies of Novapolis could have noticed the invitation to the study on the social media platforms of Novapolis. Therefore, it is not possible to calculate an accurate response rate for the survey when the final amount of recipients is unknown. It should be noted that 117 respondents is still an acceptable sample size for an online study that is not applied to a larger population, and therefore, can provide approximate results on the research questions (Heikkilä 2014).

4.3 Results

The first background question was the industry in which the respondent works in (Figure 2). The options were chosen according to the classification of industries from 2008 by Statistics Finland (s.a.c). 17.1% reported 'Other service activites' as their industry, and the next largest qroup with 13.7% was 'Human health and social work activities'. Other larger groups were 'Professional, scientific and technical activities' (12.0%), 'Administrative and support service activities' (12.0%), 'Construction' (11.1%), and 'Education' (11.1%). None of the respondents worked in 'Agriculture, forestry and fishing', 'Water supply; sewerage, waste management and remediation activities', 'Transportation and storage', or 'Arts, entertainment and recreation', which is logical, since these industries are not present in the tenant companies of Novapolis. The second background question was about the respondent's position at their organization. The options were adapted from Statistics Finland's Classification of Socio-economic Groups 1989 (Statistics Finland s.a.a). The largest position group was senior salaried employees with 34.2%. Other positions were represented as follows: salaried employees 24.8%, workers 21.4%, executives 17.1%, and entrepreneurs 2.5%. There were no students or 'Others' present in the sample.

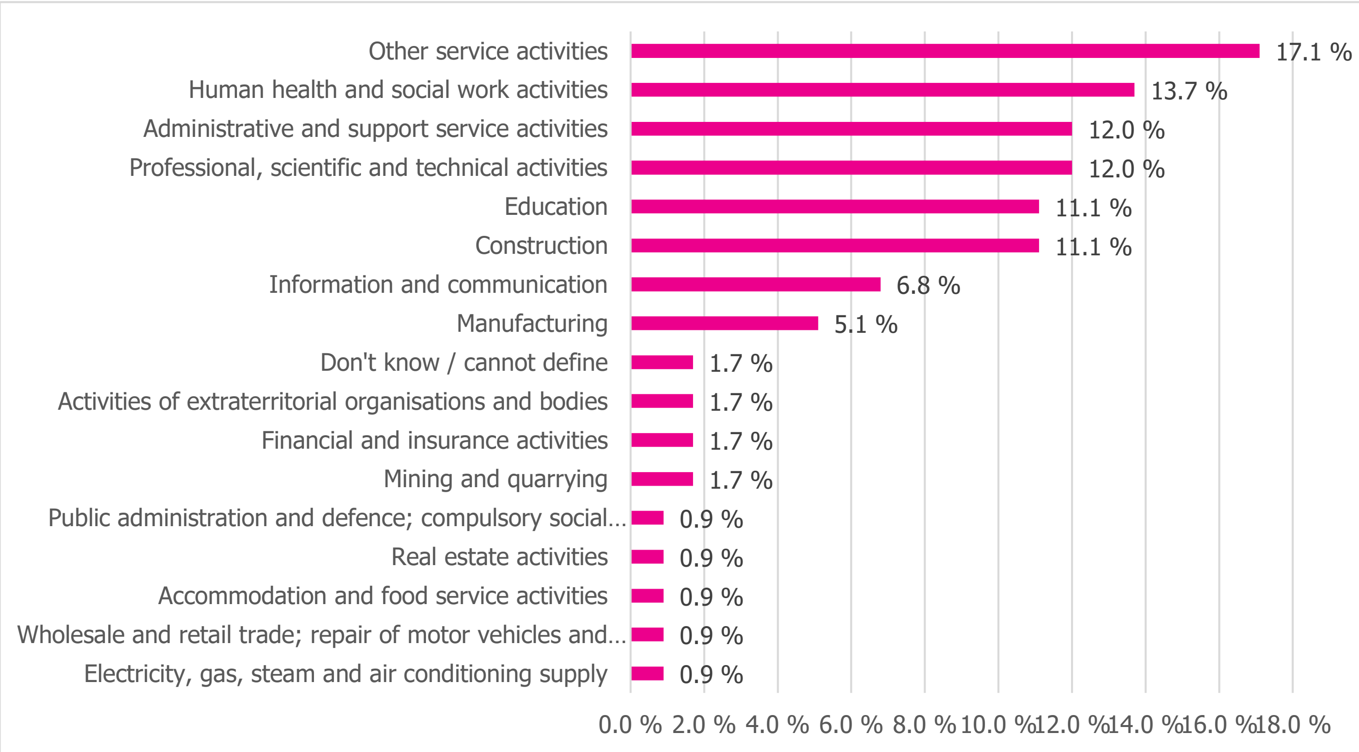

Figure 4. Industry, n=117

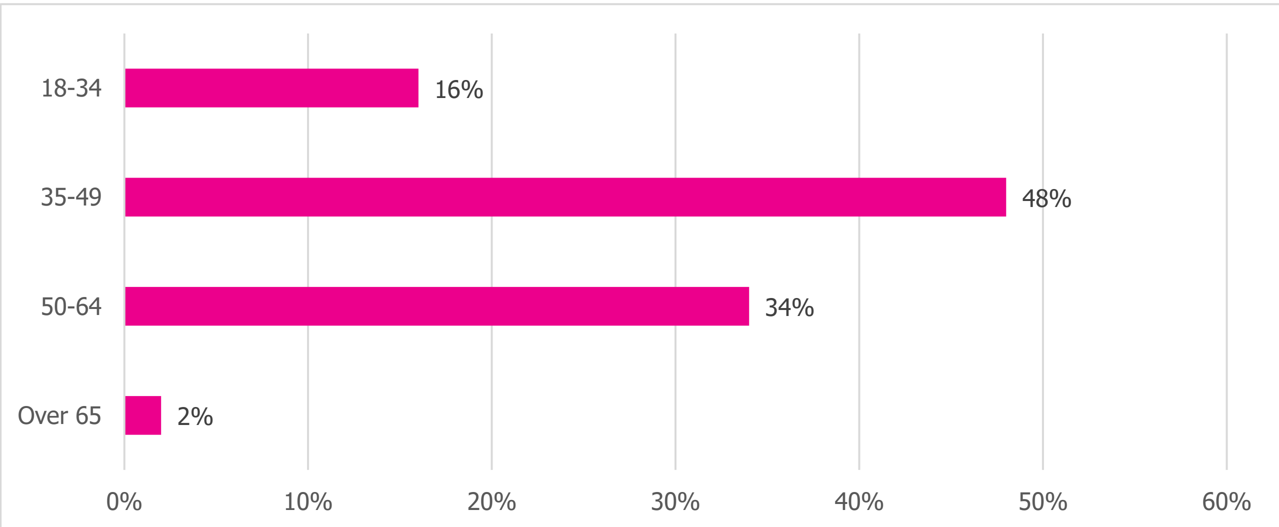

Figure 4. The age distribution, n=117

The age distribution of the survey can be seen above (Figure 3). The largest age group with 47.9% was 35 to 49. The age distribution categories were chosen according to Statistics Finland classifications (Statistics Finland s.a.b).

The first two questions about the future of working life were about remote work. First remote work question asked the respondents to estimate how many days a week they are working physically at their workplace at the moment of the survey. The answers show that the amount of days spent physically at the workplace were differing at the moment of the survey (Figure 4, pink). Most of the respondents were working 5 days a week (30.8%) or 1 to 2 days a week (29.0%) at their workplace. Only 15.4% of the respondent were working mostly remotely. On the next question, the respondents were asked to estimate the days per week they would spend physically at their workplace in a three years' time (Figure 5, purple). 5 days a week at the workplace dropped to 15.5%, whereas 3 to 4 days a week increased to 42.2% and 1 to 2 days a week to 34.5%. The percentage of mostly remote workers dropped to 7.8%.

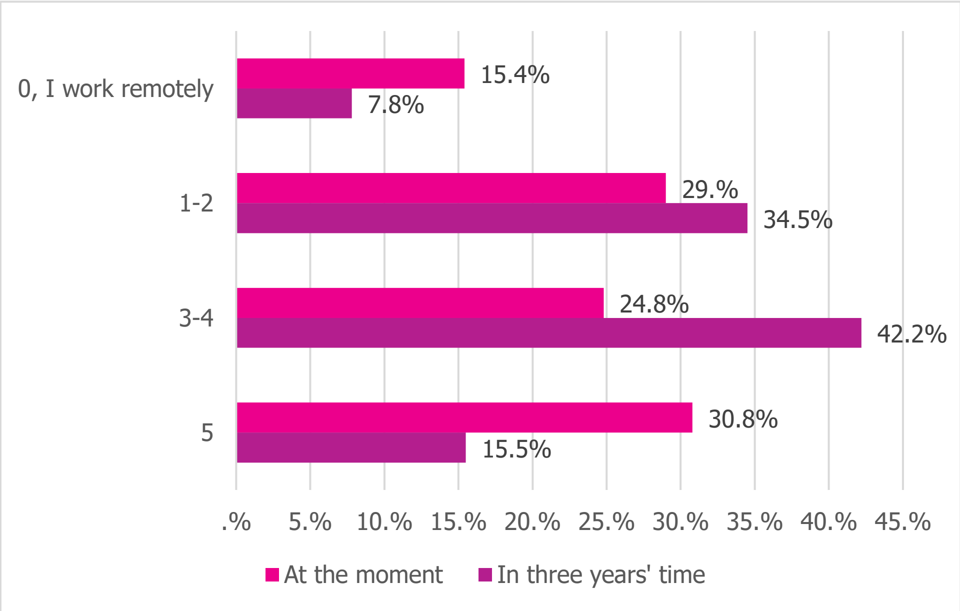

Figure 5. Days per week worked physically at the workplace at the moment (n=117) and in three years' time (n=116)

For more detailed examination, the responses from questions 5 and 6 were cross-tabulated with the respondents position at organization (Figure 6 and Figure 7). As the response sizes differ from each other, it is difficult to compare the groups. Still, the cross-tabulation provides some approximate indications of differences. At the moment of the survey, most responses amongst executives and workers were placed in '5 days per week' -option whereas most of both senior salaried and salaried employees worked 1 to 2 days at the workplace. In three years' time, all positions have an increase in the option 3 to 4 days per week. Executives as well as workers had an increase also in the 1 to 2 days -option. It is notable that executives and senior salaried employees have 0 respondents working mostly remote in three years' time. In percentage terms, workers have the largest amount of respondents working 5 days a week at the workplace in three years' time.

	Executive		Senior salaried		Salaried employeee		Worker		Entrepreneur	
	n	Percent	n	Percent	n	Percent	n	Percent	n	Percent
0, I work remotely	4	20 %	2	5 %	6	20.7%	4	16 %	2	66.7%
1-2	2	10 %	15	37.5%	10	34.5%	6	24 %	1	33.3%
3-4	4	20 %	13	32.5%	8	27.6%	4	16 %	0	0 %
5	10	50 %	10	25 %	5	17.2%	11	44 %	0	0 %
Total	20		40		29		25		3	

Figure 6. Position at organization and the days worked physically at workplace at the moment

	Executive		Senior salaried		Salaried employee		Worker		Entrepreneur	
	n	Percent	n	Percent	n	Percent	n	Percent	n	Percent
0, I work r	0	0 %	0	0 %	4	13.8%	3	12.5%	2	66.7%
1-2	7	35 %	15	37.5%	10	34.5%	8	33.3%	0	0 %
3-4	9	45 %	20	50 %	12	41.4%	7	29.2%	1	33.3%
5	4	20 %	5	12.5%	3	10.3%	6	25 %	0	0 %
Total	20		40		29		24		3	

Figure 7. Position at organization and the days worked physically at workplace in three years' time

In the next question the respondents were asked to estimate in which locations they could be working regularly in a three years’ time. The question allowed multiple choices and the total number of cases was 290. Respondents chose approximately 2,7 options. Workplace (90.6%) and home (82.9%) were the most popular locations, whereas the next largest group was secondary residence with 35%. Both hotel environment and cowork environment received 8.5% of the responses. Next was outdoors (6.8%), externally managed conference rooms (5.1%), other rented space (4.3%), and coffee shops or other public spaces (3.4%). 2.6% of the answers were marked in ‘Somewhere else, where’-option, and these were at a train and in Lapland at a cottage.

The eight question asked the respondents to estimate what kind of activities they will physically perform at their workplace in three years’ time (Figure 8). The total amount of cases was 497, when multiple options could be chosen, and the average amount of chosen options was 4,3. As can be seen from Figure 5, the three most frequently chosen options were team or project work (72.4%), communication with coworkers (68.1%) and meetings (67.2%). The lowest percentage of 12.9% was in creative work. ‘Other’ option was chosen by 9 respondents (7.8%) and the answers could be categorized into three categories: laboratory work, coping and printing, and others, which included job interviews and contact teaching.

The next question included five statements regarding the future of working life in three years’ time (Table 4-1). The first statement concerned developing work competence, and most of the respondents somewhat agree (43.6%) or strongly agree (43.6%) that their work will face changes that require developing their competence. The average of the statement was 4.3. The second statement claimed that technological development reduces the need for travelling for business reasons. 50.4% somewhat agrees and 34.2% strongly agrees with the statement, meaning that majority agrees with some degree as the average was 4.1. The third statement regarded the change in ease of separating work and leisure. 31.6% somewhat disagreed and 16.2% strongly disagrees with the statement that it will become harder to distinct work and leisure, whereas 23.1% somewhat agreed and only 2.6% strongly agrees. 26.5% did not agree or disagree, making the average 2.6. On the fourth question, 44.4% considered that the meaning of the community of the work environment is highlighted, whereas 14.5% somewhat disagrees. 27.4% did not agree or disagree, and therefore, the

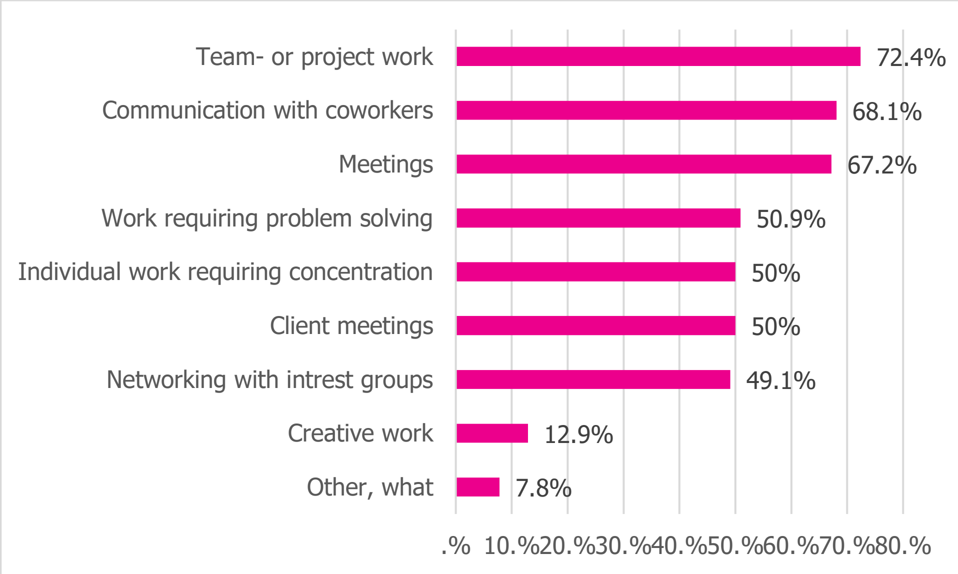

Figure 8. Activites performed physically at the workplace in three years' time, n=116

average was 3.4. The fifth statement looked at the necessity of services offered in the workplace that help in everyday life. 34.2% of respondents agreed somewhat, and 23.1% did not agree or disagree. Both strongly and somewhat disagree options got 15.4% and 11.9% strongly agreed, making the average 3.1.

Table 4-1. Statements regarding the future of working life, n=117

	1 Strongly disagree	2 Somewh at disagree	3 Do not agree or disagree	4 Somewh at agree	5 Strongly agree	Average	Median
In the next three years, my work will face changes that make developing my competence necessary	2.6%	0 %	10.2%	43.6%	43.6%	4.3	4.00
Technological development decreases the need for business travels in the next three years	0 %	7.7%	7.7%	50.4%	34.2%	4.1	4.00
In three years, it will be harder for me to distinct my work and leisure	16.2%	31.6%	26.5%	23.1%	2.6%	2.6	3.00
In the next three years, the meaning of the community of my work environment is highlighted	3.4%	14.5%	27.4%	44.4%	10.3%	3.4	4.00
It is desirable that my workplace would offer different services to ease the everyday life within the next three years; for example delivering groceries to the workplace	15.4%	15.4%	23.1%	34.2%	11.9%	3.1	3.00

The tenth question looked at workplace qualities that will be important for the workplace comfort in a three years' time (Table 4-2). The respondents were able to choose three qualities that are especially important, and the total number of answers was 339. The three most frequently chosen qualities were wide selection of food and coffee services with 49.1%, qualities that support physical well-being with 41.4% and the colors, materials and design of spaces with 26.7%. Around 20% chose also conference rooms with videoconferencing equipment (22.4%), coworking spaces / communal workspaces (21.6%), being environmentally friendly (20.7%), and security (19.8%). The least frequently chosen qualities were data from sensor technology (2.6%), corporate social responsibility (6.0%), and outdoor space (8.6%). The option ‘other’ included 15 answers (12.9%), and eight of them contained qualities related to quiet and private spaces or other wise functionality of spaces. Parking was mentioned in three of the answers. Other open answers included for example hair salon and cosmetologist services and easy accessibility of the workplace.

Table 4-2. Workplace qualities that are important for the workplace comfort in three years' time, n=116

Workplace qualities	Percentage
Being environmentally friendly	20.7 %
Biophilia / nature elements	14.7 %
Colors, materials and design of the spaces	26.7 %
Communal events	16.4 %
Conference rooms with videoconferencing eqipment	22.4 %
Corporate social responsibility	6.0 %
Coworking spaces / communal workspaces	21.6 %
Other communal spaces, such as lobby or lounge areas	11.2 %
Other, what	12.9 %
Outdoor space	8.6 %
Qualities supporting physical wellbeing, such as bike racks, spaces for relaxation or gym	41.4 %
Security	19.8 %
Services of everyday life, such as grocery store services, postal services or daycare for children	18.1 %
Utilizing data from sensor technology, such as utilization rate and temperature	2.6 %
Wide selection of food and coffee services	49.1 %

The next question included list of services, and the respondents were asked to choose all the services they would use if they were offered in their workplace. The total amount of answers was 484 with the average response being approximately 4,3. As can be seen from Figure 6, gym was chosen by 60.2%, making it the most popular service in the list. Pop-up restaurant (41.6%) and roof terrace (40.7%) were the next often chosen services. The least interesting services were daycare centre (6.2%), bike commuting club (7.1%), and event design team (8.8%). The option ‘other’ included eight responses (7.1%), and the services that were in more than one answer were a grocery store and free parking.

The services were cross-tabulated with age to gain more in-depth look at how age affects the chosen services. As the response sizes in age groups differs from each other, the results are approximate. The age group of over 65-year-olds consisted of only 2 respondents, and was therefore left out of this calculation. The age group of 18-34 chose approximately 4,5 options, 35-49 group 4,4 options, and 50-64 group 3,7 options. These numbers are estimates, as the amount of responders for the eleventh question was only 113. All age groups had gym, pop-up restaurant and roof terrace in their five most popular services, while the other two services differed. In the five most popular

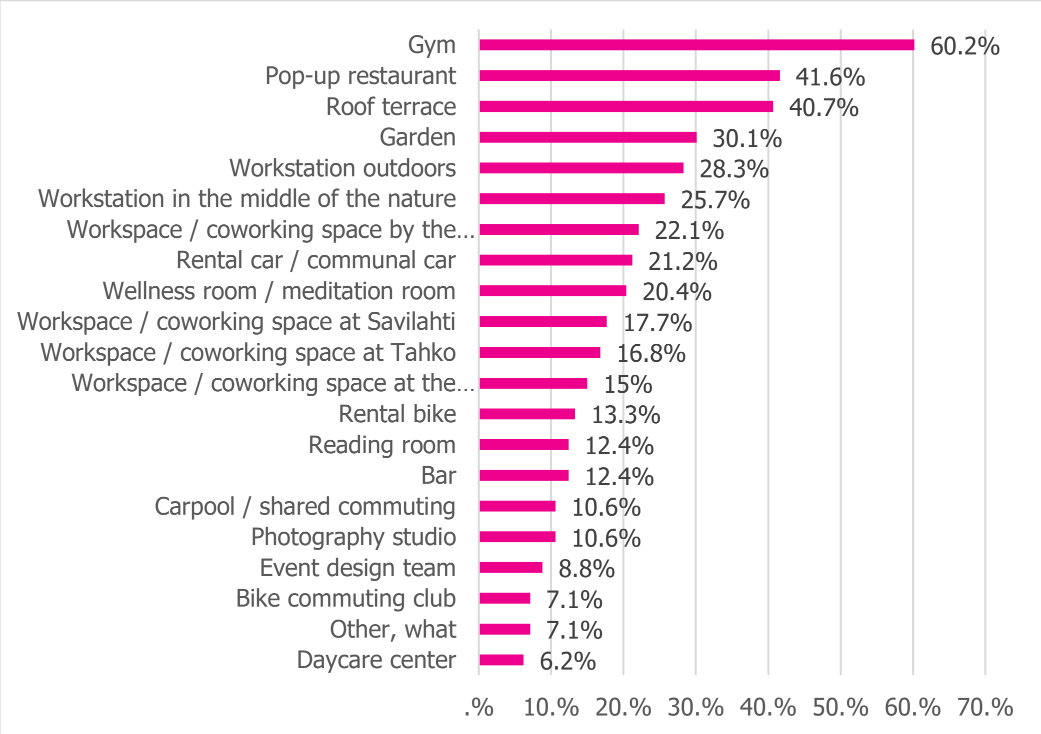

Figure 9. Services that would be used if they were offered at workplace, n=113

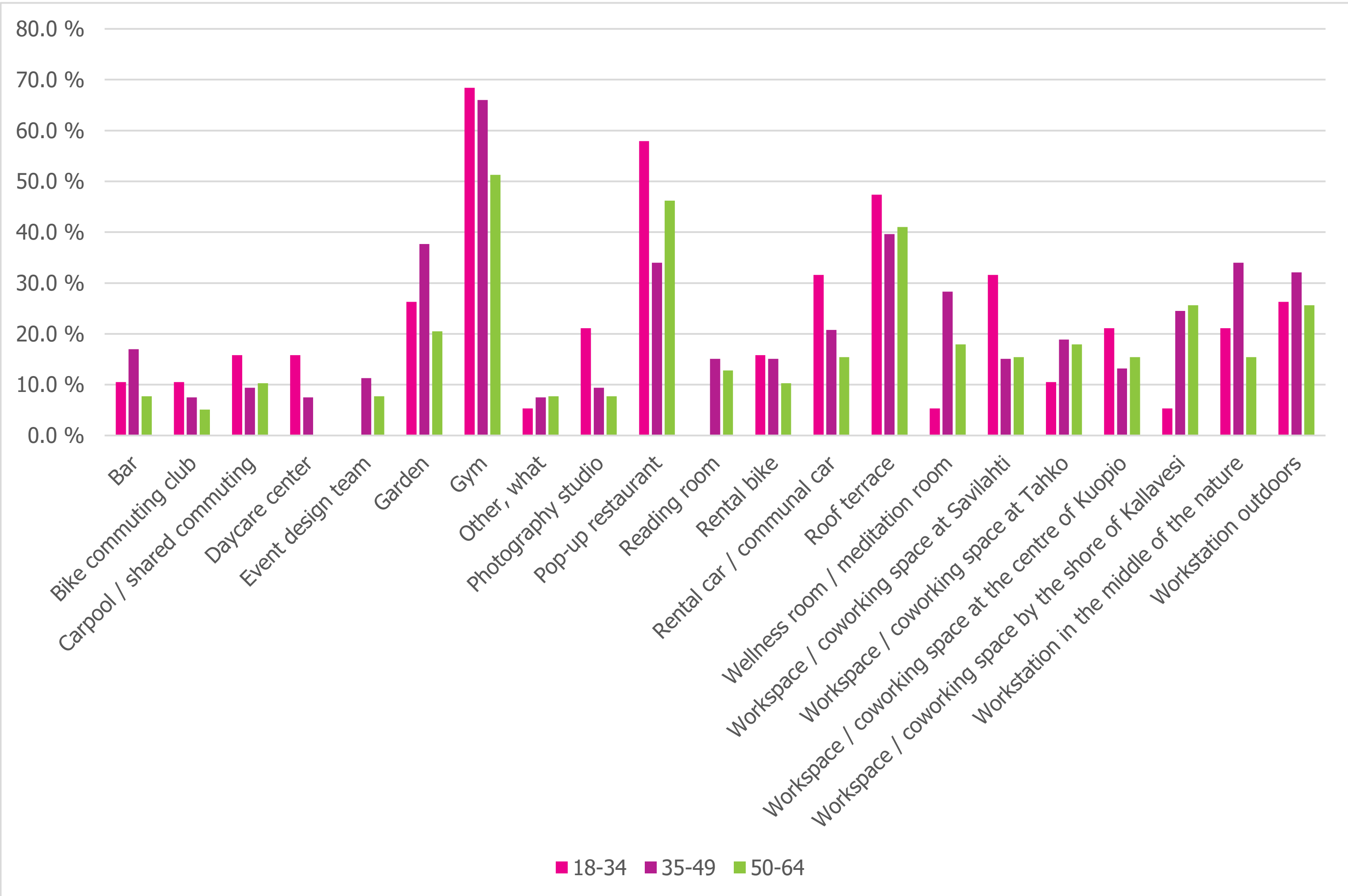

Figure 10. Services that would be used if they were offered at workplace, n=113

services in the age group of 18-34 were a rental car/communal car and a workspace/coworking space at Savilahti. The age group of 35-49 had garden and a workstation in the middle of nature among their top five, whereas 50-64 had workstation outdoors and workspace/cowork space by the shore of Kallavesi. Other notable result was the difference in the preferred workspace/cowork location as the age group 18-34 chose most often the option in Savilahti, whereas the other two age groups most often chose the space by the shore of Kallavesi. Also, 35-49 year-olds chose more often services from the ‘access to nature’ group than the other two age groups.

The final question asked the respondents to estimate how likely offering the services they chose on the previous question would increase their interest in working at Novapolis premises. The response options were on a scale from 1 to 5, 1 being extremely unlikely and 5 being extremely likely. 116 respondents answered and the average was 3.8. 44.0% chose the number 4 and 25.9% chose 3. Only 1.7% (1) and 6.9% (2) estimated that offering the services would extremely unlikely or unlikely increase their interest, meaning that majority estimated the services would have a positive effect on their interest in working at workplace located at Novapolis.

5 CONCLUSION AND SUGGESTIONS

5.1 Conclusion

The survey of this thesis looked into the working life of the tenants of Novapolis and how it might change in the near future as well as to what kind of services would be used if Novapolis would offer them. The objective of these research questions was to provide information that can help Novapolis to prepare for the changes in working life that affect their tenant companies and provide better services and spaces for their clients. The results presented in the previous chapter show some indication on what kind of changes could happen in the next three years, and also, what services are interesting to the end-users at Novapolis.

Based on the questions regarding remote work and multilocality, it is evident that a hybrid strategy is the most likely model for majority of the respondents (Figure 5). This statement is strongly supported by the theory (Cook 2020; Kropp 2021; McGahey 2021; Thomas et al. 2020; Luoma-aho 2021), which suggests that if enabled by the requirements of work, work is done from multiple locations, not only from the workplace. At the same time, remote work and full-time attendance are not disappearing, indicating that some prefer to work remotely while others wish to return to the workplace or are not able to work remotely. The results show some indication that the employee's position at their organization affects the amount of days worked in the workplace, yet a more detailed research is needed for better evaluation. Workplace and home were the most popular work locations, but also secondary residence was somewhat popular option. This was in line with the weak signal presented by Hietaniemi & Poussa (2020), which indicated that the summer cottage sales were increasing during the pandemic, and workers wanted an escape from the city environment. In the near future, workers are still interested in a change of location, and on average, the tenants of Novapolis estimate to work in at least two locations regularly.

When looking at the actions respondents estimated to perform in the workplace in the near future, it is clear that the workplace remains as a place for different tasks. As most of the options received high levels of votes and the average number of chosen options was over four, it can be concluded that multiple different tasks are performed at the workplace also in three years' time. This is consistent with the action-based design and acknowledging the various tasks different positions perform with differentiated spaces (Leesman 2019; Thomas et al 2020; Luoma-aho 2021). There is an obvious need also for quiet spaces at the workplaces, as half of the respondents estimated to perform individual work that requires concentration in the workplace. This was not particularly present in the benchmarked companies, and it seems that the quieter spaces were either for meditation or reading. However, quiet spaces were present in the open answers regarding important workplace qualities, and thus shows the importance of providing space for concentration. The three most chosen options all include collaboration with coworkers, which shows that the social aspect of the workplace and the workcommunity are important for the employees and the workplace continues to serve as a meeting space. This is supported by Leesman Index (2020) study which showed evidence that collaboration and formal meetings are more efficiently performed at the office. Creative work had the lowest percentage of the options, which could be due to the lack of creative work at the positions of the respondents or the respondents viewed it to be done better at home or at another location. As the question shows, varied tasks are performed at the workplace, and therefore the need for differentiated spaces is clear.

Most of the respondents believed that developing their work competences becomes necessary in the next three years (table 4-1). This is in line with the notion that the skills needed and the content of work changes especially with technological developments (Oksanen 2017; Clauson 2020; Lund et al. 2021). The view that eventually most work is complex and cognitive is still far away, but the tenants of Novapolis seem to understand the importance of continuous learning. Majority of the respondents also recognize that technology partly replaces travelling for business reasons (Lund et al. 2021), and thus partly increases the flexibility of the work. Almost half of the respondents believe that in the near future distincting work and leisure will not become harder, which is in contradiction with the view by Oksanen (2017). The reason for this might be that the respondents either do not have the option to telecommute or did not see work entering home as a problem. It is possible that the changes in employment and constructions of work are not occurring in a larger volume yet, and therefore the lines between work and leisure are not yet blurring. The meaning of the work environment’s community was viewed to increase by half of the respondents. However, also many expressed that they do not agree that the importance of the community would increase. When compared to the benchmarked companies, three of them provided community activities and services, which could suggest that there is demand for such activities. The results could stem from the difficulty of estimating the change in the future or the community is already viewed as an important factor. All these statements show that some changes can be expected in the working lives of the clients of Novapolis.

The interest in services that support everyday life was divided in the results. On average, the importance of providing these services in the workplace in three years’ time was neither agreed or disagreed on. When asked to choose the three most important workplace qualities, almost fifth of the respondents chose ‘services of the everyday life’. In the open answers regarding services wanted in the workplace, two respondents wished for a small grocery store at the premises. This shows that there is some demand for services supporting everyday life. These services were mostly present in the benchmarked business park (Cobalt Park 2021), which also had the largest amount of tenants and most likely external users for these services. It might be that some of the end-users do not wish to blur the lines between work and leisure by having groceries, children’s daycare and workplace all in the same address. Closer research on what kind of services supporting everyday life are actually wanted could show clearer development direction.

The questions regarding workplace qualities and services that are wanted in the workplace show clearly that the most wanted service categories are food and coffee services and health and wellness services. These services that affect employee wellbeing are highlighted in many ways in most of the benchmarked companies as well as in previous studies (for example: Appel-Meulenbroek et al. 2018; Fora 2021; Leesman 2021). When comparing answers concerning outdoor spaces, the answers were differing between questions. Among workplace qualities, outdoor spaces were chosen by almost fifth of the respondents, whereas in the service list the services from category ‘access to nature' were all in the ten most popular services with roof terrace on third place. A possible explanation is that these nature related services are not viewed as the most important ones for the workplace comfort, yet they are interesting. Despite being largely present in the benchmarked companies, services categorized as 'positive distraction' (bar, reading room and photography studio) were not considered especially interesting. Based on these questions, it is evident that the services missed the most at Novapolis are related to employee wellbeing and food and coffee services. When connected to the last question, it can be concluded that offering the most popular services would increase the interest of the end-users working at Novapolis' premises.

Overall, the results support the idea of hybrid work being the new way of working. The significance of the workplace remains high in the near future, while multilocality is explored in moderation. Regarding the service supply, the gym and other qualities supporting physical wellbeing, and restaurant services seemed to highlight their importance.

As the sampling method is not based on the probability, the results are only an indication of what the opinions of Novapolis' tenants are. The results cannot be applied generally to other business premise users, neither was that the intention. The sample of external clients had only two responses, which also decreases the reliability of the study. The intention to compare the two samples did not materialize, but fortunately the data from the employees of tenant companies is valuable on its own. However, if the study would be performed in exactly the same way, it could be that the results would be similar. The validity of the research is slightly decreased, since four open answers included in the survey did not answer the particular questions. This could indicate that the questions were not understood as intended and the operationalization has not fully succeeded. Still, the number of these answers was small compared to the total number of responses and they do not affect the credibility of the research in general. Overall, the survey provides approximate direction to the research questions.

5.2 Suggestions

Based on the research results and the theoretical background, some suggestions for Novapolis can be formed. Physical wellbeing, especially a gym and cycling-related issues were seen as important features in the workplace. Either investing into a gym or other fitness space or including local gyms to the Sisäpiiri-discounts program could be suitable ways to include these wanted services to the service supply. Similar popularity was seen with the restaurant and coffee services. The current alteration work at Microkatu brings a new restaurant and coffee shop to one of the locations, whereas new restaurant operator opened at Viestikatu at the end of the summer. Still, it seems that the tenants wish more variation, and perhaps the pop-up restaurants could be the way of executing this. Currently the opening hours of the restaurants are limited, and extending them should be considered within the current pandemic guidelines. A small coffee kiosk or coffee machines could be an option to supply refreshments outside the opening hours of the restaurants. Nature related services were one of the popular service groups in the survey, and an easy way of investing to these could be improving the outdoor areas at the current locations with for example seating areas and greenery or garden. In case more locations are considered, a workspace or cowork space at the shores of Kallavesi was the most popular option according to the results. Especially the open answers showed a demand for quiet spaces. These might not be popular spaces in the tenants' own workpaces, and therefore, these could be provided by Novapolis. To support the resilience of the community, Novapolis could provide workshops or Origo Live content that helps support the continuous learning and developing working life competences of their clients.

5.3 Self-evaluation

The process of conducting this thesis has improved my professional expertise regarding the issues of future working life as well as the development directions of the business premises field. My prior knowledge of anticipating future and working life was minimal which is why writing the theoretical background was interesting. The complexity of the topic made the process fascinating and slightly challenging at times. Both working life and business premises are rather broad and complex topics and therefore, the theory base was wide and fascinating. As the topic is current, new material has been published through out the writing process. For this reason, the theoretical background would be slightly different if is was written now. Unfortunately, the survey did not include the external respondents. Still, conducting the quantitative study was an educational experience and helped connect the topic concretely to working life. Actually implementing a quantitative survey from start to end was a new experience and it showed clearly the problems and issues of conducting a research. The process illustrated the necessity of thorough planning and execution, and will provide a good base for any future research projects.

Writing this thesis has developed my understanding of the factors affecting working life in the future, which will benefit me professionally in my future career. The process as a whole has shown the importance of future scenarios in building the forthcoming working life. Especially these aspects fit into my personal study plan, and support my interest in human resources management. Combining business premises field and KPY Novapolis to future working life provided an opportunity to connect my previously gained professional knowledge to new information. This thesis has shown me new perspectives to the business premises field, making the whole process educative. It can be concluded that the personal aims were reached.

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APPENDIX 1: FACILITIES AND SERVICES IN BENCHMARKED COMPANIES

Basic facilities and services	Private office
	Conference rooms
	Kitchen
	Restaurant or coffee shop
	Lounge area
	Office supplies, printing and WiFi
	Mail handling
Flexibility and control	Mobile app
	On-demand office space
	Multiple locations
	Dedicated desk
	Open desk (hot-desking)
	Co-working space
	Customizable office space
	Access membership
	Team membership
	Virtual office
	Supporting business services
	Overnight accomodation
	Daycare center
	Rental cars
	Shared commuting
Fitness and health	Wellness room
	Breakfast
	Refreshments
	Fitness centre or gym
	Customizable wellness packages
	Sports club
	Hospital
	Rental bikes
Positive distraction	Events
	Event space
	Screening room
	Podcast studio
	Reading room
	Club room
	Photography studio
Access to nature	Outdoor space
	Roof terrace
	Garden
	Walking routes

APPENDIX 2: THE QUESTIONNAIRE

The future of working life and business premises

Welcome to a survey!

This survey is part of a thesis carried out at Savonia University of Applied Sciences. The thesis and this survey are executed in co-operation with KPY Novapolis. The subject of the thesis is the future of working life and the development directions of the business premises field. The purpose of this survey is to investigate in what ways the respondents estimate their working life to change in the next three years and map out the level of interest of services possibly offered in the future.

By answering this survey, you can help KPY Novapolis to develop even better workday experience and future supply of services. All answers and opinions are important. Answering the survey takes approximately 5-10 minutes. All answers are anonymous and confidential, and no individual respondents can be recognized. Answers are erased after they are compiled to the thesis.

Please answer the survey by 9.11.2021.

Thank you for your time and answers!

Kind regards,
Nea Pohjolainen
BBA-student
Savonia University of Applied Sciences

More information regarding the survey or the thesis:
nea.pohjolainen@edu.savonia.fi

Background questions

1. Industry *

◯ Agriculture, forestry and fishing

◯ Mining and quarrying

- ◯ Manufacturing
- ◯ Electricity, gas, steam and air conditioning supply
- ◯ Water supply; sewerage, waste management and remediation activities
- ◯ Construction
- ◯ Wholesale and retail trade; repair of motor vehicles and motorcycles
- ◯ Transportation and storage
- ◯ Accommodation and food service activities
- ◯ Information and communication
- ◯ Financial and insurance activities
- ◯ Real estate activities
- ◯ Professional, scientific and technical activities
- ◯ Administrative and support service activities
- ◯ Public administration and defence; compulsory social security
- ◯ Education
- ◯ Human health and social work activities
- ◯ Arts, entertainment and recreation
- ◯ Other service activities
- ◯ Activities of extraterritorial organisations and bodies
- ◯ Don't know / cannot define

2. Position at organisation *

- ◯ Executive position
- ◯ Senior salaried employee
- ◯ Salaried employee
- ◯ Worker

- ◯ Entrepreneur
- ◯ Student
- ◯ Other

3. Age *

- ◯ 18-34
- ◯ 35-49
- ◯ 50-64
- ◯ Over 65

4. Are you working at a company which is a tenant at KPY Novapolis? *

- ◯ Yes
- ◯ No

The future of working life

5. Approximately, how many days a week do you physically work at your workplace at this moment?

- ◯ 0, I work remotely
- ◯ 1-2
- ◯ 3-4
- ◯ 5

6. Approximately, how many days a week you think you will physically work at your workplace in a three years' time?

- ◯ 0, I work remotely
- ◯ 1-2
- ◯ 3-4
- ◯ 5

7. In which of the following options you are working regularly in a three years' time? You can choose multiple options.

- ☐ At your workplace
- ☐ At home
- ☐ At a coffee shop or other public premises
- ☐ At a cowork environment (communal, shared work space)
- ☐ At your secondary residence
- ☐ At externally managed conference room
- ☐ At a hotel environment
- ☐ At other rented space
- ☐ Outdoors
- ☐ Somewhere else, where ________

8. What kind of activities you estimate to perform physically at your workplace in a three years' time? You can choose multiple options.

- ☐ Individual work requiring concentration
- ☐ Team- or project work
- ☐ Work requiring problem solving
- ☐ Creative work
- ☐ Communication with coworkers

- [ ] Networking with intrest groups
- [ ] Meetings
- [ ] Client meetings
- [ ] Other, what

9. How would you asses the following statements?

	1 Strongly disagree	2 Somewhat disagree	3 Do not agree or disagree	4 Somewhat agree	5 Strongly agree
In the next three years, my work will face changes that make developing my competence necessary	○	○	○	○	○
Technological development decreases the need for business travels in the next three years	○	○	○	○	○
In three years, it will be harder for me to distinct my work and leisure	○	○	○	○	○
In the next three years, the meaning of the community of my work environment is highlighted	○	○	○	○	○
It is desirable that my workplace would offer different services to ease the everyday life within the next three years; for example delivering groceries to the workplace	○	○	○	○	○

Services of the future

10. Choose three (3) of the following workplace qualities which you think are especially important for the workplace comfort in three years' time.

- [ ] Being environmentally friendly

- [ ] Biophilia / nature elements
- [ ] Colors, materials and design of the spaces
- [ ] Outdoor space
- [ ] Qualities supporting physical wellbeing, such as bike racks, spaces for relaxation or gym
- [ ] Coworking spaces / communal workspaces
- [ ] Other communal spaces, such as lobby or lounge areas
- [ ] Communal events
- [ ] Corporate social responsibility
- [ ] Wide selection of food and coffee services
- [ ] Conference rooms with videoconferencing eqipment
- [ ] Security
- [ ] Utilizing data from sensor technology, such as utilization rate and temperature
- [ ] Services of everyday life, such as grocery store services, postal services or daycare for children
- [ ] Other, what

11. Choose from the following options all the services which you would want to use if they were offered at your workplace.

- [ ] Workspace / coworking space at the centre of Kuopio
- [ ] Workspace / coworking space by the shore of Kallavesi
- [ ] Workspace / coworking space at Savilahti
- [ ] Workspace / coworking space at Tahko
- [ ] Rental car / communal car
- [ ] Carpool / shared commuting
- [ ] Wellness room / meditation room

- ☐ Gym
- ☐ Rental bike
- ☐ Bike commuting club
- ☐ Reading room
- ☐ Photography studio
- ☐ Roof terrace
- ☐ Garden
- ☐ Workstation outdoors
- ☐ Workstation in the middle of the nature
- ☐ Event design team
- ☐ Pop-up restaurant
- ☐ Bar
- ☐ Daycare center
- ☐ Other, what

12. How likely is it that offering the services you chose on the previous question increases your interest in working at the premises of KPY Novapolis?

	1	2	3	4	5	
Extremely unlikely	○	○	○	○	○	Extremely likely

APPENDIX 3: OPEN ANSWERS IN THE SURVEY

7. In which of the following options you are working regularly in a three years' time? You can choose multiple options.
junassa, jos asun esim. muualla kuin toimipaikka
Lapissa mökissä
eläkkeellä
8. What kind of activities you estimate to perform physically at your workplace in a three years' time? You can choose multiple options.
Laboratoriotyö
jos joskus tarvitsee kopioida jotain niin se tulisi tehtyä työpaikalla
Työhaastattelut
Tulostaminen
eläkkeellä
Labra- ja pajatiloissa tapahtuva ohjausta vaativa lähiopetus.
Laboratoriotyö
Tulostaminen ja kopiointi sekä postilokeron tyhjennys
Laboraatiot ja Simulaatiot
10. Choose three (3) of the following workplace qualities which you think are especially important for the workplace comfort in three years' time.
kunnolliset pyörätelineet, ei tuo pelkästään hyvinvointia vaan ihan kulkuneuvon turvallisuutta
Tilojen äänieristys tksityisyyden suojan vuoksi
Hiljaisemmat tilat
autojen pysäköinti
Parturi-, kampaamo- ja kosmetologipalvelut
Liikkuva työ, joten autojen pysäköintitilat lähellä toimistotilaa.
Työpaikan helppo saavutettavuus
Ergonominen työpiste
työtilojen muunneltavuus tarpeiden mukaan
Sisäilman laatu
Yksilölliset pienet ja hiljaiset työtilat/-huoneet.
Yksityiset työtilat.
Auton pysäköintiin kiekkopaikkoja. Ilmaista ja helppoa pysäköintiä.
Rauhalliset työtilat
hyvä valaistus
11. Choose from the following options all the services which you would want to use if they were offered at your workplace.
työmatkapyöräilyä voisi edistää esim. sillä, että saisi hankittua pyörän keräämällä ostoporukan. Jos kerralla ostaa 10 pyörää niin saa varmasti jonkinlaisen alennuksen verrattuna, että ostan yhden.
Kaikkien käyttö riippuu hinnasta
Ruokakauppa tai edullinen ruokakassi toimitus
Ilmainen parkkipaikka autolle ja / tai riittävästi mitoitettuina pyörätelinepaikkoja
Eläintenhoitola
Viestikadulle pieni kauppa
Jotain muita ravintolapalveluita kuin Antell ja joka olisi myöhempään auki, sekä lauantaisin.
Maksuton pysäköinti!!!!